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ABSTRACT

This report summarizes the results of a feasibility study of the Bay Area Literacy Referral Network (BALRN), a local literacy referral system established in 1985 by the coordinators of the 13 Bay Area literacy projects, which in turn were established by the California Literacy Campaign initiated in 1983. Funded with Library Services and Construction Act funds, BALRN was designed to test the feasibility of establishing a commercial toll-free telephone referral service as a regional measure to improve access to literacy assistance, and to evaluate various elements of the referral system. Evaluation of BALRN included such considerations as the ability of the answering service operators to be sensitive and encouraging to the callers and to provide accurate and timely referrals. Based on the evaluation, it was decided to continue the system and support it with local funds. Lessons learned during BALRN's implementation are described and final recommendations are summarized. In addition, chapters on the implementation process include discussions of the referral service, the referral process, the evaluation process, project findings, media coverage for the 800-number referral service, managing BALRN, and making the transition from federal to local funding. The text is supplemented with seven tables and two exhibits, and additional information is provided in thirteen appendices which include the BALRN questionnaire and responses, the operators interview questionnaire and responses, the BALRN data collection log, and sample public service announcements. (KM)

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THE BAY AREA LITERACY REFERRAL NETWORK FINAL REPORT

DECEMBER, 1986

BY

MARGARET J. ROBINSON

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FINAL REPORT

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MARGARET J. ROBINSON

The work reported herein was performed pursuant to a grant from the California State Library with federal Library Services and Construction Act (LSCA) funds. It does not however, necessarily reflect the position or views of that agency.

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EXECUTIVE SUMMARY

The California Literacy Campaign (CLC) was initiated by the California State Library in 1983 with federal Library Services and Construction Act (LSCA) funds. Part of the campaign effort was to fund 27 library adult literacy programs. As part of the California Literacy Campaign, 13 local Bay Area literacy (BALit) projects were spawned in an effort to significantly reduce the more than 1.1 million adult illiterates in the 14 counties, which comprise the Greater Bay Area.

In spite of their success and strong community support, CLC program coordinators were able to recruit less than 1% of the estimated illiterate population into their literacy programs because of: 1) inequitable program publicity, 2) confusion among potential clients about the availability of local service, 3) misdirected and delayed referrals from the national referral system, 4) lack of uniform procedures for handling referrals and 5), limited access to programs during off-times and non-working hours.

To address these deficiencies, the 13 BALit coordinators conceived and initiated the idea for a local literacy referral system. The result was the Bay Area Literacy Referral Network (BALRN) funded in October of 1985 with LSCA funds. BALRN was to test the feasibility of establishing a commercial referral service as a regional measure to improve access to literacy assistance and to evaluate various elements of the referral system. Continuation of the local service and possible state wide replication was to be dependent upon the successful evaluation of the service.

BALRN established a 24-hour, 7 day a week toll-free telephone referral service January 2, 1986. The toll-free telephone number was the first step in a two-tier process of referral. The first tier provided enquirers initial referral to a local CLC program. The second tier provided additional information or referral to a more appropriate agency or literacy provider if called for, at the local level.

Evaluation of the service was based on the performance of the telephone answering service. This included the ability of the operators to be sensitive and encouraging to the callers and to provide accurate and timely referrals. Other elements of the service to be evaluated were its cost effectiveness, the volume of inquiries to the service, and the affect of turn around time on participation in local CLC programs.

Analysis of data collected from the answering service indicate that the program was successful. Based on the performance of the operators the answering service proved that

a commercial agency with personnel trained in serving and communicating with CLC clients is economical and can provide an effective method of referral. Furthermore the study showed that referrals were accurate and timely and that operators were sensitive and encouraging to the clients.

Based on feedback and reports from CLC coordinators, we can also surmise that the project was successful at the program level in increasing program activity and client referrals for the majority of CLC programs. However, it is difficult to determine at this time, what real impact the service had on participation.

During the nine month evaluation period:

- The answering service handled 1071 inquiries and made referrals to 24 local CLC programs.
- CLC programs were contacted by 485 callers and 217 of these enrolled in local CLC programs.
- Forty-one percent or 201 of the 485 callers contacted a program the same day of referral and 107 or 53% of these enrolled.
- Approximately 61% of the referrals who contacted the programs initiated the contact within two days.
- The majority, 684 (64%) of the callers were women, 478 (45%) were learners, 373 (35%) were tutors and 220 (20%) wanted information.
- One hundred and eleven (51%) of those who enrolled in CLC programs were learners, and 31 (14%) of the information callers enrolled.
- The volume of inquiries ranged from a low of 15 to 547 per month.
- San Francisco, Santa Clara/Milpitas and Oakland received 51% of the total number of referrals.
- Television was cited 67% of the time as the source of information about the toll-free number.
- The volume of inquiries is tied closely to the amount of advertisement about the service.
- The majority of calls to the answering service were made on Mondays and Tuesdays between the hours of 8am and 12 noon.

- Few calls (4%) were made between midnight and 8am, and on Saturdays and Sundays (8%).

- Seventeen non-CLC libraries reported 146 direct inquiries resulting from 800 publicity and referred 68 of these to local CLC programs.

All 13 BALit coordinators decided that the establishment of BALRN successfully addressed the deficiencies that initiated the idea for a local literacy referral system, and that it provided a "worthwhile" resource to their communities. On the basis of their experience with the service and preliminary assessment of its effectiveness, including the efficiency and timeliness in which referrals were handled, the quality of interaction between the operators and the clients, and its' appealing costs, BALit made the decision to continue the service and to support it out of local program funds. Other programs were invited to join the service and BALRN now has two new paid subscribers.

This report is the result of the feasibility study to establish a referral service to improve access to literacy assistance. It describes procedures, findings and insights, makes recommendations and documents the lessons we have learned.

CHAPTER I

BACKGROUND, NEED AND PROJECT DESCRIPTION

It is conservatively estimated that over a million adults in the 14 counties comprising the Greater Bay Area are functionally illiterate. In an effort to significantly reduce that number, the California Literacy Campaign spawned 13 local literacy projects through Bay Area libraries (BALit). Despite remarkable initial success, by the end of the first year of operation less than one percent of the estimated illiterate population were enrolled in these local projects.

Achieving maximum participation in the CLC programs requires that potential clients throughout the Bay Area are provided with referral to the appropriate local project, and that referrals are timely and accurate. Local and national referral efforts have proven unsatisfactory because of:

1. Difficulty in advertising local projects because of the advertising media, which selectively chooses information about where to call for literacy assistance. The project which successfully gets its message disseminated to the public through television, radio and newspaper advertising, unwittingly becomes the referral agent for the other projects.

2. Confusion among potential clients by the advertisement of "local programs" which are in fact, located too far away. For example, viewers outside the Bay Area may see T.V advertisements for the San Francisco project. Assuming a toll call and travel to San Francisco are required to get help, some viewers will be deterred from seeking available assistance.

3. Misdirected clients and prolonged delays in confirming referrals by the Contact Literacy Center (National Hotline), resulting in the loss of potential clients.

4. Lack of a uniform system for handling inquiries and for monitoring the quality of interaction and accuracy of referrals.

5. Limited access to local programs operating on a work-week schedule and walk-in enrollment policy. Clients are most affected by these limitations when interest generated by the media aired during late evening and early morning hours is high and programs are not accessible because of their regular operating hours.

To address these deficiencies, 13 Bay Area CLC project coordinators (BALit) conceived the idea of creating a new referral service designed to meet local needs. The result was a nine month project, the Bay Area Literacy Referral Network (BALRN), a contract awarded to the Bay Area Library and Information System (BALIS) by the California State Library using funds from the federal Library Services and Construction Act. Its purpose was twofold: 1) to establish and test the feasibility of a commercial referral service in improving access to local literacy programs; and 2) to evaluate the methodology of the project and the effectiveness of its various elements for possible statewide applications.

The project utilized a commercial agency to provide access 24 hours, 7 days a week to a toll-free telephone referral service to local CLC programs for residents of the Greater Bay Area. The telephone answering service made initial referrals only to libraries participating in the CLC program. Once the caller was referred to the participating library, a second level referral to non-CLC libraries or other literacy programs was made if appropriate. Second level referrals were made for callers when there was no CLC program in the community or when the caller needed a program at a more appropriate skill level (e.g. an ESL program for a non English speaking client, or an ABE program for a client reading above a fourth grade level).

A proposed media component to develop an advertising plan for the project was not funded. The plan was to have identified the appropriate advertising media and methods to achieve the broadest coverage of publicity for the client group. While local projects did adapt their advertising and public service announcements to highlight the 800 number, the impact fell short of what would have been accomplished with a planned media campaign.

The 800 referral system was originally intended to serve only the BALit library programs which were located along the northwestern border of California. However, expansion was necessitated by the boundaries of the PacBell toll-free service areas. This included all 27 CLC library programs in Northern California. These fell within the service area from Fresno to Del Norte Counties along with 60 non-CLC public libraries. For purposes of data collection these 87 libraries were separated into the following three groups:

1. The 13 BALit libraries in the Greater Bay Area whose coordinators conceived and initiated the idea for the service.

2. The 14 CLC libraries in Northern California who were not BALit members but who were invited to participate because they were situated in the toll-free service

area, and would automatically receive inquiries from clients.

3. The 60 public libraries who were not participating in the California Literacy Campaign (CLC) but who received second-level referrals from CLC programs or direct inquiries generated by advertisement of the 800 number.

The overall goal of the literacy referral service was to substantially increase participation in the local programs by the illiterate population of the Bay Area. The quality of service to be provided was also an important principle of the project.

A second goal of the project was to explore the feasibility of linkages, both procedural and technical, between the existing national toll-free service (Contact Literacy) and the regional toll-free service and develop agreements that would:

1. Complement the national system that already exists.

2. Improve the capability to provide immediate and comprehensive information to assist Bay Area callers.

The report focuses on the process of establishing a commercial 800 toll-free service. It describes the results of the project and provides recommendations for others who might want to provide access to literacy assistance with the use of a commercial telephone service.

CHAPTER II

WHAT WE LEARNED

Setting up the BALRN toll-free service had different requirements than other referral services because it utilized a commercial answering service agency. In this chapter we describe briefly what we consider to be key points of interests learned about this system of referral including some major conclusions about setting up this type of service.

LESSONS LEARNED:

Performance criteria established by BALit was important in selecting the answering service.

The answering service operators played the most important role in making the service effective. Because of their importance, selection of the answering service should be based on performance criteria established by the program. These criteria should be applied while interviewing the agency supervisor to ensure a match between the type of service the agency can provide and the type of service needed by the program and the clients.

The attitude conveyed by the supervisor during the interview process, prior to selecting the agency, is often an indicator of the quality of interaction that will occur between the operators and the clients.

Smaller agencies will be more likely to agree to handle this type of literacy referral service.

Larger agencies might refuse to handle this type of referral service because they feel the time required to make a referral of this nature requires too much time and will tie up their incoming lines. In addition, their system of documenting calls is more mechanized, and they operate during normal business hours. Most will also resent the idea of someone from the "outside" wanting to train their operators.

Smaller agencies on the other hand tend to be less mechanized, and the service they provide can be more responsive to the needs of individual programs. Their system for documenting calls allows each caller to receive the personal attention of an operator. It allows for flexibility in how referrals are made and for corrective changes to be implemented quickly. It is also possible with a smaller agency for staff to interact individually with the operators to obtain valuable

feedback about how well the referral process is working.

Involve the answering service staff in developing the referral process and instruments.

Because the answering service staff knows what works best with their setup they can provide information that will be helpful in designing the referral tools, the orientation and training. Discussions with the staff and supervisor about program needs and the agency communication system can provide the necessary focus and guidelines for the format and amount of information operators can handle efficiently. Referral tools developed must be functional for the operators, must be developed in a format that allows for frequent revisions and updating, and must support the agency's system of documenting calls.

A coordinated media campaign is necessary for economical and maximum use of the referral service by the public.

There is a direct link between the amount of publicity and the use of the referral service. Replicators wishing to establish a referral service should have a media component to conduct ongoing publicity in collaboration with local T.V. and radio networks. Coordinated media publicity is essential to the effectiveness of the service.

Televison was the most influential medium for generating calls to the referral service, followed by radio. Whenever the referral service was advertised frequently on special television programming or by public service announcements on television and radio, these announcements were followed immediately by calls to the referral service. And when there was little media activity focusing on the referral service, the service was virtually unused.

BALRN FOUND IT NECESSARY TO:

Expand the original concept of program referrals.

The original proposal was to make referrals from the referral service only to the 13 local BALit programs whose idea it was to establish the service. However, because the PacBell toll-free service area covered almost all of Northern California, the service was expanded to include the 14 other CLC programs and 60 non-CLC library programs in the service area.

Establish a method of communicating with local program coordinators to maintain support of the project.

Once the toll-free service was established it was important for the BALRN coordinator to attend monthly BALit meetings, to communicate and interact with local CLC program coordinators and to exchange information and obtain their feedback about the effectiveness and quality of the service. These meetings also provided BALit members an opportunity to provide input and suggestions on the format and content of project protocols and data collection instruments, as well as the format in which they wished to receive summary data on the number and status of 800 referrals.

Establish a communication plan to inform other library affiliates about project activities and the effectiveness of the referral process.

Communicating with other libraries and library systems was an important aspect of the project. Since many of these libraries received an increase in the number of calls from clients seeking literacy assistance because of the advertisement of the referral service, they needed to be kept informed about the activities of the project. BALRN created a number of formats to inform these different groups regularly about project activities.

Although BALRN's communication plan was more extensive than someone replicating the service might need, it is important to consider; 1) who needs to be kept informed about the project; 2) what do they need to know; 3) how often and in what format should the information be provided; and 4) what staff and resources will be needed to carry out the plan.

Implement a data management system to organize and analyze the data.

Managing and analyzing the data collected from the answering service and local CLC programs required implementing a data management system to yield information that was useful in evaluating the project. While the data management system used by BALRN was perhaps more sophisticated than might be needed for other projects, the system used will be determined by the type of information and documentation needed by the project.

Regardless of what data management program is used, it will require some planning and the use of a computer in house, the services of a computer programmer to develop the program, and a staff person for data entry once the program is developed and data are collected. The amount of time required for this task

will depend upon the difficulty of the program used, amount of data entry, and the accessibility of the computer.

Identify information needs at the beginning of the program to prevent loss of important information.

The data and information needed to evaluate the service must be decided upon early and in collaboration with local programs who are participating, since it is important to get their cooperation in collecting the data. Data collection instruments should reflect program and information needs so that local programs can provide the data necessary to determine program impact and whether or not project objectives are being met.

Produce public service announcements and conduct public relations to advertise the program.

Even though the media component of the program was not funded the project coordinator was involved in writing public service announcements and appearing on local T.V. networks and radio stations to advertise the referral service. Lack of continuous publicity and a comprehensive plan for publicizing the 800 number made it important to publicize the service whenever the opportunity was made available.

FINAL RECOMMENDATIONS

The final recommendations are meant to provide some guidelines for establishing an 800 referral service or for replicating BALRN. The recommendations are based on what was learned during the nine month study.

Recommendation no. 1: When establishing a referral service such as BALRN, it is essential that project participants understand the objectives of the service and that they agree on what will be required of them as participants.

In the design of the program and prior to establishing the toll-free service, all program coordinators and potential participants need to be thoroughly oriented about their role and what is expected of them. Program coordinators need to know how their programs will benefit from the service, what the reporting requirements will be, and they need to be given an estimate of the amount of staff time required to collect and report the data (Reporting requirements will be influenced by the nature of the information needed and the format of the tools used to collect the information).

Even though a small group of BALit program coordinators

worked with the Bay Area Library Information System (BALIS) in developing the proposal for the project, not all program coordinators were equally vested in the design of the project, because of program staff changes. Some (BALit) programs did not have as much to gain from the service. Others were invited to participate after the project was started because of the necessity to extend the service to include programs in the toll-free service area. Non-CLC libraries were also asked to report information on referrals after the service was established because they were recipients of second level referrals from CLC programs.

These and other factors which affect the level of committment from participants for the referral process should be addressed during the design of the program and prior to establishing the service.

The service coordinator (paid or volunteer) who is selected or assigned to manage the service, should be provided background information (e.g. new program staff, planners of the project, affiliate groups and their role) on all participants, if not involved in the initial planning process of the project. This will enable the coordinator to plan how to conduct follow-up, keep participants involved, reaffirm their role and reporting requirements, and start them off with positive expectations about the benefits of the service in spite of the demands that will be made on their time.

Recommendation no. 2: Decide what type of information is needed minimally to verify the effectiveness of the program and to aid in making decisions on current and future directions.

It is essential that programs participating in the project collect data necessary to analyze the success of the service and to enable them to make decisions about the future of the service based on concrete evidence. To ensure the cooperation of program participants in the collection of data they should be informed about the importance of the data to be collected and how it will be used. This should facilitate their willingness to provide data essential for assessing and documenting the services' impact at the program level and whether this type of service is cost effective and desirable for referral.

Although it may not be possible to determine what data management resources are needed until after some data are collected, instruments and decisions about what type of data to collect have to be decided upon at the beginning of the program and should be decided collaboratively. The overall goal and objectives of the program will provide the focus for the types of information needed to verify its' effectiveness.

Recommendation no. 3: Design and implement an on-going coordinated media campaign to advertise the referral service. This is essential if the service is to be useful and economical.

Any media effort for BALRN should include a formal plan to systematically and continuously disseminate and recycle information through available media channels so that publicity is ongoing, and the public is constantly reminded that the service is available.

Public affairs directors at most local media networks may be available to assist the program with the development of such a plan. It is important for programs to remember that the service is more economical when the volume of calls is highest. The importance of publicity should not be underestimated.

Recommendation no. 4: Program participants and service providers must understand that a referral service will have an impact on their programs and must be prepared to address the demands.

The majority of the CLC coordinators indicated they have a backlog of learners waiting to be teamed and volunteers waiting to be trained to begin tutoring (see Appendix, Questionnaire Response), and the demand for service is increasing. If the demand for service continues to escalate, indications are that programs will be hard pressed to continue to provide service at the current level of funding. To do so, according to program coordinators, would require an increase in their budgets, an increase in staff to recruit and train new tutors, and more materials and resources for learners.

In anticipation of the increase in the demand for service, programs should have reserved a pool of tutors enrolled, trained and available to begin tutoring new students shortly after they are enrolled.

If programs are to be effective in providing literacy assistance they will need to find the resources to shore up shrinking staff and dollars to alleviate the backlog of clients already waiting to be served. Even though the numbers of illiterates continue to be staggering, it is dysfunctional and demoralizing to those seeking assistance to continue to recruit students if programs do not have the capability of serving them.

CHAPTER III

THE REFERRAL SERVICE

There are several steps involved in getting an 800 number and establishing the toll-free referral service. Setting up the service requires working with two systems and the requirements for each is different. The following chapter describes the necessary steps required to establish the referral service.

Establishing the referral service requires contracting for two services in two locations, one with the telephone carrier and the other with the answering service agency. When installed, the two services operate as a unit with separate components. Before the service can be established, two preliminary tasks need to be completed almost simultaneously. They are: 1) getting an approved 800 number from the telephone company, and the appropriate toll-free 800 service and 2) selecting the answering service agency.

GETTING AN 800 NUMBER

The divestiture of AT&T has complicated the process and the time involved in obtaining any type of telephone service. However, PacBell does have service representatives assigned to work specifically with agencies or individuals to set up an 800 service.

California is divided into 10 service areas and provides three different types of inbound toll-free services which are: Metro 800, Half state and Full state 800 service. The telephone company clusters area codes in different configurations to form a toll-free service area, some of which overlap. The five area codes (209, 408, 415, 707, 916) assigned to the BALRN Service covered half the state (see p. 11).

Before an 800 number is assigned it must be verified to insure that it is not a duplicate number. Under normal conditions it takes from five to ten working days to get an 800 number assigned by the telephone company, and the service must be ordered at least 30 days prior to activating the service. At the time of assignment, the telephone company needs to know the location of the agency where the number will be installed and the date it is to be activated. To select the appropriate inbound 800 service, it is crucial to know what area codes are within the toll-free service area you are purchasing, to prevent the program from getting the wrong service. Checking with the telephone carrier a week before the service is to be activated

PACIFIC BELL MAP

BALRN TOLL-FREE SERVICE AREA

The toll-free service was extended from area 1 to the Half State Service Area which included 1, 2, 3, 4, 8 and 9.

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is recommended to ensure they have installed the "right" service.

SELECTING THE ANSWERING SERVICE

For the BALRN project, all the answering services in the East Bay were interviewed by telephone. During the interview process, the performance criteria established by BALit were used as guidelines to determine which agency best matched the client and service needs of the project.

Final selection of the answering service for BALRN was based on two primary factors: 1) an affirmative response to all the performance criteria, and 2) the positive attitude exhibited by the supervisor during the interview, including her willingness to be flexible and the interest she displayed about the project. Since one of the major concerns in setting up the service was whether it could be personal and user-friendly, the affective characteristics and sensitivity of the operators (usually influenced by the supervisors), was an important selection consideration. The performance criteria established for the answering service were as follows:

1. Ability to provide service 24 hours per day, 7 days per week.
2. Ability to maintain their identity as an answering service (not as members of the project).
3. Ability to be sensitive, patient and encouraging to the caller.
4. Willingness to use a written script and referral instruments when making referrals.
5. Willingness to undergo orientation and training.
6. Willingness to test the instruments and provide feedback to the program
7. Willingness to adapt behaviors based on client feedback and feedback from the advisory members.
8. Ability to handle a large volume of inquiries and referrals.
9. Ability to make referrals accurately.
10. Ability to make referrals using a zip code format in numeric order or using a city format in alpha order.

Selecting the appropriate answering service was the most important process in setting up the referral service. The role of the operators should not be underestimated, and selection criteria that is relevant to the program should be stringently applied when selecting the agency.

The agency selected was the Alameda Answering Service, a small agency with 12 full-time and four part-time operators. Because of its size and the personal (rather than mechanical) service offered by the operators the agency offered more flexibility and operators were very responsive to the needs of the project and the clients.

Rapport was established with the operators at the beginning of the study by letting them know they had a major role in the success of the project, seeking their input on data collection procedures, involving them in the development of the referral instruments, and making them part of a team effort. Establishing rapport with the operators was a most important factor and instrumental in gaining their cooperation and their willingness to accept feedback from the program coordinators and deal with the ongoing revisions to the "Referral Guide".

BALRN staff realized when setting up the service that without accurate information and referral tools that were functional for the operators, they would not be able to provide an effective service. Consequently, the operators assistance was enlisted in developing and refining the instruments to their satisfaction.

The operators were key to the success of this study. In addition to providing input on the referral instruments, they collected the bulk of the "raw" data, provided encouragement to many callers who were not "quite sure they could get help", and responded immediately to the numerous changes made in refining the "Referral Guide" throughout the study. They expressed genuine concern about being able to provide accurate information and assisting clients in getting the help they sought.

TRAINING AND ORIENTATION

Unlike other agencies interviewed, the Alameda Agency agreed to undergo orientation and training. A training packet was developed for the operators which included background information about the California Literacy Campaign, rationale for the study, the Interview Script and the Referral Guide and instructions for making referrals. These materials were used in orienting the operators and supervisors to the nature and purpose of the study, and in explaining how to use the instruments to refer clients to local programs and to collect essential data.

The Guide containing library programs for referral initially used a zip code format. This proved to be too cumbersome because many clients didn't know their zip code, and because there was confusing overlap between areas, it took the operators twice as long to locate the appropriate program (e.g. San Mateo and Menlo Park used the same code, but have different programs). Taking the suggestions of the operators, the zip code format of the Referral Guide was changed to a format with cities listed in alphabetical order.

The script for interviewing callers was also reviewed with the operators and they were asked to pay particular attention to the language until they were familiar with the referral process. The importance of their role in collecting the data was emphasized, and suggestions were solicited from them on how best to collect the data needed. During training/orientation the operators were encouraged to ask questions and to provide feedback about what worked and didn't work for them during the referral process.

Finally the operators were asked to view a videotape of four adults describing what it was like for them not being able to read (Teaching Adults to Read. Adair Films, 1984). The video was intended to help the operators gain an understanding of the needs of the client and to create an awareness about the type of person they would be getting inquiries from, since most of them had little previous experience with non-readers. The video was left with the agency one week for viewing by the operators during their breaks.

Orientation of the operators was ongoing. Each time changes were made in the Interview Script and the Referral Guide, a short orientation was held with the operators to alert them to the changes, explain how to use the information if necessary, and answer any questions. At the end of the orientation, the outdated material was collected and replaced with updated material. The repeated orientations provided a way of insuring that updated information would be utilized immediately.

Table 1 on the following page provides a step-by-step process for setting up the referral service with an 800 number.

TABLE 1

STEP-BY-STEP PROCESS FOR SETTING UP THE REFERRAL SERVICE

TELEPHONE CARRIER	PREPARING TELEPHONE AGENCY AND OPERATORS
1. verify service area and program needs. Set date to activate service	1. verify program needs and review/develop selection/ performance criteria
2. select telephone carrier and order service 30 days prior to start-up date	2. construct informal interview questions based on performance criteria
3. submit number for verification. Normally takes 5 to 10 work days	3. contact and interview several answering service agencies
4. verify number and review service. Identify name and location of telephone service agency	4. select agency, arrange for referral service, and inform them of start-up date
5. set up billing contact	5. clarify billing, base number of calls and contractual obligations if any
6. write the number down so you won't forget it	6. meet with answering service to reiterate needs and verify methods of referral to programs
7. call a week in advance of start-up date to ensure there are no problems	7. get input for training materials
8. if service will be extended, get the number in the 800 Directory	8. plan logistics and schedule training
	9. develop protocols and training materials
	10. conduct test of protocols if possible
	11. conduct training/ orientation
	12. implement system, update information as needed

TELL THE OPERATORS WHEN THEY MAKE MISTAKES AND TELL THEM OFTEN WHEN THEY ARE DOING A GOOD JOB

CHAPTER IV

THE REFERRAL PROCESS

The referral process was designed as an interactive communication model with three distinct components: 1) the answering service (receiving inquiries, collecting and dispensing information) 2) the client (providing and seeking information and service) and 3) the CLC programs (validating information and providing resources and service). The referral system was also designed to provide uniform procedures for handling inquiries, monitoring referrals for accuracy, and documenting contact and follow-up with CLC programs within a short time frame.

The referral process involves taking the caller from the initial program referral by the answering service to contact and follow-up at the local program level. Five basic instruments were used to complete the referral process. These were: 1) the Referral Guide used by the operators to make the initial program referral to the caller, 2) the Referral Slip used by the operators to obtain contact information from the caller, 3) the Confirmation Memo used to provide contact information about the caller to the local programs, 4) the Data Collection Log used to document contact and follow-up of the caller at the program level, and 5) the Tally Sheet used to document the number of direct inquiries and second level referrals received by non-CLC libraries. What follows is a step-by-step explanation of the referral process.

DETERMINING THE STATUS OF CALLERS

At the time of initial contact with the answering service, callers are assigned to one of three status groups according to how they identify themselves to the operators: 1) as learners, 2) as tutors, or 3) as "wanting more information". After screening the referral slips from the answering service, callers may be further classified into subgroups of "other" or "miscellaneous" callers.

The information caller is a potential client usually doing research on the program to determine if the program can provide the help he or she is looking for. Although it is not possible to determine how many of the information callers enrolled as learners or tutors from the information reported by the CLC programs, they are potentially either learners or tutors.

The miscellaneous caller is seeking another type of information and/or resources for a variety of reasons that do

not include participation. Thirty-nine callers were in this subgroup. They included:

1. Reporters
2. A graduate student conducting research
3. Requests for employment
4. Callers wanting to start a program
5. Complaints about the ad on 20/20
6. Requests for referrals to literacy programs in Florida, Texas and Santa Ana CA.
7. Request for information on GED testing centers
8. ABC's Literacy Plus testing the service
9. Requests for local and national statistics on illiteracy

All of these callers who provided the answering service with contact information received responses to their calls within three days of the initial 800 call. Those callers requesting referrals to literacy programs in other states were referred to Contact Literacy (National 800 number) and the caller wanting a program in Santa Ana was referred to the Santa Ana CLC program.

HANDLING REFERRALS, FROM OPERATORS TO PROGRAMS

Each person calling the 800 number is briefly interviewed by an operator to obtain his/her status, resident jurisdiction, and contact information. The information provided by the caller is recorded by the operator on a "referral slip". The operator then locates the callers' city in the Referral Guide, selects the appropriate local program and provides the caller with the name of the library, telephone number, and name of a contact person. The intent is to personalize the referral as much as possible and to motivate the caller to initiate the call to the program instead of waiting to be contacted. A small percentage of callers who preferred to contact the programs themselves gave only their resident jurisdiction which was necessary to obtain contact information.

DOCUMENTING THE 800 CALLS

The "referral slip" filled out by the operators to document each call was the main source of raw data for BALRN. Referral slips were picked up by the project coordinator, depending upon the number of inquiries received, three to five mornings each week. Besides being the source of documentation for the 800 referrals, they were used also to monitor accuracy and to weed out "miscellaneous" or "other" callers (see Determining The Status of Callers) seeking information or other resources.

During the start up phase of the service when the Referral Guide was arranged in zip code order, callers were not sure of their zip codes, operators were unfamiliar with the programs, and the Guide was undergoing constant additions and revisions, a small percent of referrals were inaccurate. Reviewing the referral slips was an important process for monitoring accuracy.

ROUTING THE CALLS

Two basic utility forms, the Confirmation Memo and the BALRN Data Collection Log were developed to facilitate CLC program contact with the client and follow-up at the local level (see Appendix). These instruments were reduced to a level of simplicity that precluded transmitting any unnecessary information, eliminating the need for extensive record keeping by program coordinators, yet providing uniform procedures for routing referrals to the program. They also enabled BALRN to document the referral process, monitor the amount of time it took for follow-up and action taken with clients at the program level. The Tally Sheet was another form developed to provide a method for non-CLC libraries to report the number of second level referrals from CLC programs and the number of direct inquiries they received.

PROVIDING CONTACT INFORMATION

The "Confirmation Memo" was used to provide local programs with contact information: date of 800 call, name, telephone number, and status of caller. Other contact information offered by the caller was included in the "memo". Memos were mailed to each CLC program receiving referrals on the same day they were picked up from the answering service. The frequency in which "Confirmation Memos" were mailed each week was influenced by the number of inquiries received by the answering service on a given day, and within one to three days (weekends) of the initial referral.

COLLECTING PROGRAM DATA

The "Data Collection Log" was used to provide local programs with a composite list of referrals received over a fifteen day period and was mailed to programs bi-monthly. The "Log" provided each program with the following information: date of the 800 call, name of caller, status of caller, gender, and source of 800 information. Programs were requested to complete the missing data on each caller, to provide information on the number of direct inquiries and to return the "Log" to BALRN within two weeks. The names of the callers were recycled on each succeeding log until the local program indicated what action had been taken with the caller. The "Log" was used to document completion of the referral process, to monitor the time frame between the initial 800 call and follow-up or contact at the program level, and to document the final action that occurred (e.g. contact but no action, enrolled, second referral, read out of the program).

TRACKING SECOND LEVEL REFERRALS

A "Tally Sheet" was also developed to collect data on the number of CLC referrals and/or direct inquiries received by the 60 non-CLC libraries. Tally Sheets were mailed to these libraries monthly in an effort to track callers who received second level referrals from CLC programs. Libraries were asked to indicate the number of CLC referrals or direct inquiries they received that were generated by advertisement of the 800 number, how the referrals were handled, and to report the information to BALRN on the monthly "Tally Sheet".

V

THE EVALUATION PROCESS

The focus of the evaluation process was on collecting formative information useful for revising and improving the program in process and for collecting information that could be utilized in assessing impact and making recommendations. Additional data were gathered from the CLC programs and the answering service personnel to get their impressions about the process of referral.

Criteria for evaluating the performance of the answering service operators and testing the effectiveness of the referral process were established by BALit. Informal observations of the operators handling referrals and test calls by CLC coordinators and others calling the 800 number were also used to monitor the quality of the interaction between the operators and the clients.

The methodology was designed with three objectives: 1) to collect only those data needed, 2) to keep the reporting process and instrumentation simple and 3) to make the data collection tools multipurposeful. The tools and methods used to collect these data were:

The Referral Slip - a standard documentation form filled out by the operators at the answering service, that provided a profile on each caller, a means for screening calls and monitoring the accuracy of referrals, and the primary source of raw data and information for the database.

Informal observations - unscheduled observations of the operators handling referrals and interacting with the clients, to monitor referral procedures and to assess the accuracy and quality of client interaction.

Test calls - made by CLC coordinators to test the accuracy of referrals and quality of client interaction.

The Confirmation Memo - a communication tool to provide early contact information to local CLC programs for short time contact and follow-up with 800 referrals.

The Data Collection Log - a communication and retrieval tool used to provide CLC programs with a composite list of referrals over a 15 day period, and to retrieve follow-up and outcome data on 800 referrals.

The Answering Service Interview Schedule - face to face

interview conducted with answering service operators to obtain their impressions of their role and the impact the programs had on them personally.

The Coordinator Questionnaire - a subjective assessment. Mailed to 18 CLC Program coordinators to assess the impact of the referral service on their programs and to obtain their impressions of the effectiveness of the service.

Data for BALRN were collected primarily from four of these major sources: 1) the referral slip, 2) the data collection log, 3) face to face interviews with the operators and 4) the mail out questionnaire to the CLC coordinators.

DATA MANAGEMENT

D-BASE III was used for data management and analysis of BALRN data. The programming was designed to allow data entry in any sequence, but organized alphabetically by CLC program and client last name. The program was refined to 14 fields of data that enabled the programmer to retrieve information for report purposes, in a variety of configurations. The programming underwent continued refinement as the data were being entered. Fields of data used for the program were organized around criteria established for evaluating the study and are listed below:

1. CLC program
2. Status of caller: L=learnerr; T=tutor; I=Information
3. Last name
4. First name
5. Telephone number
6. City of caller
7. Gender: M=T; F=F
8. Date of call to answering service
9. Time of call to answering service
10. Date of contact with CLC program
11. Day of week call was made to the answering service
12. Source of information for the 800 number

13. Action taken with client: no contact; enrolled; second referral; other

14. second referral/source

DATA ENTRY

The data collection log was the main resource used for data entry. To ensure that data were accurate, each log returned to BALRN by the CLC program was reviewed and prepared for data entry. Raw data provided on the referral slips from the answering service were coded on the data collection log, and eliminated the need to handle multiple referral slips when entering the data. The information coded on the log included the following:

1. City of client

2. Telephone number if given

3. Time of day answering service was called

4. Day of week answering service was called

5. Date client made contact with CLC program

6. Action taken with client (no contact, enrolled)

7. Source of second referral

With these fields of data BALRN was able to track clients to the local program level to verify contact and follow-up, verify time lapse from the 800 call to program contact, verify number of referrals who enrolled, verify use of the 800 number by time segment, and finally, verify impact and correlation of the media on the volume of calls.

CHAPTER VI

PROJECT FINDINGS

NUMBER OF INQUIRIES

The answering service reported handling 1071 inquiries for the test period beginning January 2, and ending September 30, 1986. The number of inquiries received by the answering service is based entirely on the number of calls documented by the "referral slips". The number of inquiries and the program data reported in this chapter reflect the information provided by the answering service and the library programs. Since 51% of the calls were received in September, much of the data on program contact and follow-up were not obtained and could not be included in this report. This is especially evident when comparing the number of program contacts and the number of potential clients who enrolled in CLC programs.

BALRN got off to an exciting start January 2. The answering service received 119 calls the first ten days of operation. Expectations were high that callers would continue to use the service at that level. But the number of calls declined because of sporadic publicity until August and September, when a media blitz on literacy was initiated by the start of the ABC PLUS Campaign, International Literacy Day and Back to School. The answering service received a combined total of 627 or 58.8% of the total number of inquiries for these two months with 547 of these received for September.

The answering service handled inquiries for 25 of the 27 CLC programs in the toll-free service area. Of the 1071 inquiries received, 477 or 45% were potential learners, 374 or 34.9% were potential tutors and 220 or 20.5% were callers wanting more information about the program. Included in this group of information callers were the 39 who fell into the miscellaneous or "other" category group.

Three CLC programs consistently received more referrals each month than other programs. These were: 1) Project READ in San Francisco, 2) The Reading Program in Santa Clara/Milpitas and 3) Project Second Start in Oakland. The combined total of these three programs made up 51% of the total number of program referrals to CLC library programs for the nine month period. (see Table 2).

TABLE 2

TOTAL NUMBER OF 800 REFERRALS BY PROGRAM AND STATUS

CLC PROGRAM	Total No. Calls	Status of Callers		
		L	T	I
ALAMEDA CO PL	70	46	14	10
ALAMEDA CITY PL	9	5	3	1
AUBURN PLACER CO	8	4	1	3
BUTTE CO LIB	7	4	1	2
CONTRA COSTA	70	31	27	12
EUREKA HUMBOLDT	5	2	2	1
FRESNO CO LIB	5	2	2	1
MARIN CO LIB	37	7	24	6
MENDOCINO CO LIB	14	5	6	3
MENLO PARK	51	12	27	12
MERCED CO	1			1
NAPA CITY-CO	57	24	23	10
OAKLAND PL	151	73	52	26
RICHMOND PL	31	22	7	2
SACRAMENTO	24	10	12	2
SALINAS	13	6	5	2
SAN FRANCISCO	210	89	84	37
SAN MATEO	34	18	9	7
SANTA CLARA/MILPITAS	185	98	57	30
SHASTA CO PL	1		1	
SISKIYOU CO	1		1	
S. SAN FRANCISCO/DC	22	10	6	6
STOCKTON/SAN JOAQUIN	13	6	2	5
WATSONVILLE PL	15	4	8	3
TOTAL PROGRAM REFERRALS	1032	478	373	181
TOTAL OTHER CALLS				39
TOTAL NO. OF CALLS	1071	478	373	220

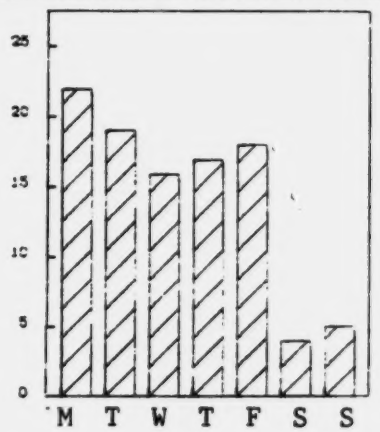
San Francisco, Milpitas/Santa Clara, and Oakland programs received the largest number of referrals.

A breakdown of the callers by gender revealed that 63.8% of the callers were female. The majority of the calls were made to the 800 service on Mondays with 232 calls or 21.68% and Tuesdays with 207 calls or 19.35%. An essential feature, of the referral service was that it was operable daily, 24 hrs per day, and provided access on the weekends. While the percentage of calls on Saturdays and Sundays cannot be considered high at eight percent, callers did make use of the weekend service when the program was advertised. A breakdown of the numbers and percentages of calls received by days of the week is presented in Table 3.

TABLE 3

NUMBER OF CALLS BY DAY OF THE WEEK

Day	Number	Percent
Mon	232	23.7%
Tues	207	19.35%
Wed	166	15.51%
Thurs	181	16.92%
Fri	197	18.41%
Sat	38	3.55%
Sun	49	4.58%

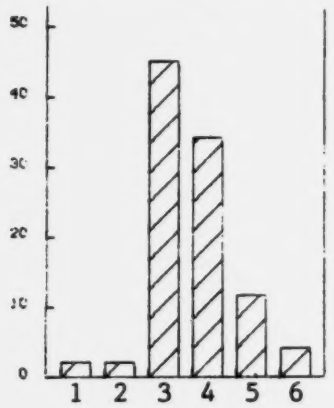


Availability of the service during off-hours seems not to have been a significant factor. Clients did use the service during off peak hours however, as expected the majority of calls were made to the answering service between the hours of 8:01 AM and 12 noon. Only 8.59 % or 92 callers made use of the answering service during non-working hours. Time of calls was related to the publicity being aired by both television and radio. For example, after viewing 20/20, a special program aired by ABC about the problem of illiteracy, 23 calls were received by the answering service following the program between 12:00 midnight and 4:00 am. Another program aired early Sunday morning generated 27 calls between 8:01 am and 12 noon, unusual because under normal conditions not that many calls were received on a Sunday. A breakdown of calls received in four hour segments is presented in Table 4.

TABLE 4

TIME OF CALLS TO 800 SERVICE

	Time From	Time To	Number	%
1.	12:00 AM	4:00 AM	23	2.14%
2.	4:01 AM	8:00 AM	24	2.22%
3.	8:01 AM	12:00 PM	484	45.19%
4.	12:01 PM	4:00 PM	366	34.17%
5.	4:01 PM	8:00 PM	129	12.04%
6.	8:01 PM	12:00 AM	45	4.20%



PROGRAM FOLLOW-UP OF 800 REFERRALS

Based on the information reported by CLC programs 485 or 45.28% of the 1071 referrals were contacted, 217 or 20.26% were enrolled and 92 or 8.5% were referred to other programs. Even after making contact with the program some clients decide not to participate or postpone participation once they discover the level of committment required. This is reflected in the discrepancy between the number who contacted the program and the number who enrolled.

Conversely, it was not possible for programs to reach every referral even though some program coordinators indicated they tried three to four times. Primary reasons reported by program coordinators for not being able to contact clients were:

- o no telephone or wrong number given
- o telephone disconnected
- o left message but no response
- o prank call
- o phony names

More learners than tutors enrolled in programs although the difference between the two is not that significant. More tutors than any other group did not follow-up with the program after initial contact. Of the 96 callers who wanted more information, 31 enrolled after contacting the local program, but it was not possible to determine whether they enrolled as learners or tutors according to information reported by program coordinators.

TIME FRAME FOR CONTACT

The "Confirmation Memo" was the primary mechanism used to facilitate early follow-up at the program level. It was followed bi-monthly with the Data Collection Log to document contact and action taken with the caller. Based on analysis of the data reported by program coordinators, turn around time (time between the 800 call and program contact) was not a significant factor for this study because most callers could get a referral to a program in their community and most contacted the literacy program immediately following a referral. Of the 485 callers who contacted literacy programs, the majority of these or 201 (41.44%) contacted the program on their own initiative and did so the same day of the initial referral by the answering service. Of the 201 callers who contacted CLC programs on the same day, 90 were learners, 70 were tutors and 41 were information callers.

The data also revealed that of the 485 callers who made contact with a program, a total of 327 contacted the programs within three days of initial contact with the referral service, and by the fifth day, a total of 356 callers had contacted the program and 171 or 78% of the total number of enrollees (217) had enrolled. The San Francisco and Contra Costa programs provide good examples. Of the 280 program referrals made to both programs by the answering service, 132 contacted the programs the same day as the day of referral and 69 of these enrolled. A small group of 12 callers contacted the programs before calling the referral service and eight of these enrolled. One caller was a former student reentering the program.

Almost all the clients who contacted the program did so within one week, and contact virtually halted after 10 days, with a small resurgence of (13) callers making contact the third week from the time of the initial 800 call. Of these, two students, two information callers and four tutors (8) were enrolled. Overall, the programs reported that for 485 of those clients who made contact with a CLC program, the shortest time span between the initial 800 call and program contact was zero days or a matter of hours and the longest time span was 8 weeks.

Since minimally it takes two to three days for the "Confirmation Memo" to arrive at the local program with contact information, 31% or 327 of the referrals initiated follow-up themselves and the majority of these, 48% or 236 were learners.

SECOND LEVEL REFERRALS

CLC program coordinators reported making a total of 92 referrals to other programs. These referrals were made to other

CLC programs, adult reading programs or non-CLC libraries either because there were no local CLC programs in the community or because the clients needed a program more appropriate for their skill level. For example, the Mendocino County CLC program, which is in a rural jurisdiction, received a total of 14 referrals from the answering service and made nine referrals to other adult literacy programs in communities located closer to the client. The Napa City County CLC program referred 13 or 26% of the 50 referrals they received to Laubach Literacy Councils and community church programs in Santa Rosa and Sonoma Counties and Vallejo. The same is true of the Salinas CLC program which received a total of 13 referrals and referred seven of these to the Monterey County Library.

CLC coordinators were provided with the California Public Library Outlet Directory to assist them in making second level referrals to non-CLC libraries. (The Directory, provides a listing with telephone numbers, of all main and branch libraries in California.) Referrals were made by CLC coordinators to the following types of programs.

- o ABE/ESL
- o Adult Reading Centers
- o Asian Mission Program
- o Career Centers
- o Community College Programs
- o Contact Literacy
- o Diablo Valley Literacy Council
- o Gilroy Public Library
- o San Francisco Legal Assistance
- o San Joaquin Delta County
- o Volunteer Bureau of Santa Cruz

SECOND REFERRALS AND DIRECT INQUIRIES TO NON-CLC LIBRARIES

The second level referral approach seems to have worked in reverse. While Tally Sheets sent to non-CLC libraries were meant to track referrals from CLC programs, none were documented even though CLC programs reported making 92 referrals to non-CLC libraries. However, 17 non-CLC libraries did report receiving 140 direct inquiries and referring 48.5% or 68 of these to local CLC programs.

The libraries reported that 26 of these enquiriers indicated they wanted help with their reading, 58 indicated they wanted to volunteer as tutors, and five indicated they wanted more information about the program. Sonoma County Library reported the largest number of inquires with a total of 53 contacts. The library staff indicated that two of these clients had been matched with each other, a learner wanting to learn English and a tutor wanting to improve his Spanish, but did not indicate the status of the remaining 51.

One problem encountered with tracking CLC referrals was that even though libraries were alerted that they would be getting an increased number of inquiries because of the 800 service and most agreed to provide the information to BALRN, they were not geared up to track clients from one system to another. For many, even providing information on the number of direct inquiries was a problem because they seemed not to have a single point of contact for potential clients inquiring about service.

Another problem associated with the second level referral, especially in programs operating in areas where literacy resources and providers are more concentrated, is that clients failed to mention they were referrals from another program when interviewed and they were consequently recorded as a direct program contact.

A breakdown of the number of inquiries reported by non-CLC libraries is presented in Table 5.

TABLE 5

INQUIRIES REPORTED BY NON-PARTICIPATING CLC PUBLIC LIBRARIES

Library	Status L	T	I	U	Action Taken	Total
Berkeley PL	2	24			referred to: Alameda Co., Richmond CLC, Berkeley LVA.	26
Burlingame PL	1				being tutored	1
Colusa FL	1		1		given progm info contact info filed	2
Lake Co L			1		referred to Co L.	1
Los Gatos ML	1				picked up material from SC PL	1
Mill Valley PL	1	2			referred to Co. Lib. Progm	3
Monterey PL	3	3			referred to Co or Seaside Library	6
Mt View PL	2	2			referred to Menlo P. CLC	4
Nevada Co L	1	3			referred to W. Nev. Co. AAUW	4
Orland FL	1				referred to Butte Co. CLC	1
Palo Alto City PL	1				referred to Menlo P. CLC	1
Redwood City PL	5	18	4		referred to Menlo P. CLC, Sam Mateo, 1 reg & ESL tutor, 1 call back	27
San Benito Co FL	2				referred to Vol T. and Salinas PL CLC	2
San Bruno PL	1	2			referred to D City S.SF CLC	3
San Leandro Co PL	2	1			referred to Alameda Co CLC, Oakland CLC	3
San Rafael PL	2	3			referred to Marin Co. CLC	3
Sonoma Co L	2	1		50	11 inquiries received at central and regional libraries. 2 learners matched	53
Totals	26	58	5	51		140

L=learner, T=tutor, I=Information, U=unknow

CHAPTER VII

MEDIA COVERAGE FOR THE 800 SERVICE

Media coverage for the 800 service was sporadic. The original proposal which included a component for a media campaign and was integral to the support of the project was not funded. The assumption was that local advertising activities engaged in by BALit programs could be coordinated to advertise the 800 number. BALIT eventually assigned responsibility for publicity of the 800 number to a volunteer committee whose membership rotated every two months. The committee was responsible for generating publicity about the 800 number and creating and mailing public service announcements to public affairs coordinators at local radio and television networks. This rotational handling of publicity hindered the elements of consistency and continuity which are vital to an effective media campaign.

CORRELATION BETWEEN REFERRALS AND PUBLICITY

One of the major findings of the study was verification of the correlation between the number of referrals and the amount of publicity being aired by the public media. Without the support of a planned media effort, the system does not operate at maximum capacity. Not only should publicity occur regularly to be effective, it should be targeted and communicated in a variety of modes at a variety of levels to reach the diverse population of potential participants served by CLC programs.

PEAK REFERRAL ACTIVITY

There were two periods of heightened activity during the nine month study: January-February during the start up phase, when 23.4% of the inquiries were received and August-September during the last two months of the study when 58.5% of the inquiries were received. From March with a high of 34 inquiries, the referrals continued to plummet until they reached a low of 15 in May, climbed to 46 in June, and to 69 in July (see Appendix, Number of 800 Referrals). During May when the calls were at their lowest, even the operators at the answering service asked "why are't we getting any calls?".

In both periods of peak activity there was a great deal of media attention given to the problem of illiteracy, and local media "hipe" about the "Literacy Hotline". In January when BALRN was established, the program was newsworthy. It was a new program available to people who had a reading problem and needed help. It was a new year which for many could offer the hope of

a "new beginning". The 800 number and the program were publicized by most of the local TV stations, local radio networks, community groups, and the press, so the program got off to a good start with 119 referrals within the first 10 days of service. The KCBS-Safeway Media Campaign planned to coincide with the start up of the 800 service was delayed until the latter part of the month, and in doing so, helped sustain the momentum of referrals with additional media support.

In August the momentum began building for the advent of ABC's Project Literacy US Campaign in September (a national campaign with the collaboration of Capital Cities/ABC, Inc. and the Public Broadcasting System to fight adult Literacy). It was time for school bells and new educational goals, National Literacy Month, International Literacy Day, and literacy was newsworthy again. In September, it seemed as if all the news stations were competing to have some connection with the 800 number. In addition there was national special programming that occurred and ads with the BALRN 800 number displayed at the end of many programs. As a result of all the media activity in September, the answering service averaged more than 100 calls per week. Many clients contacted their libraries directly as advised by one participant featured on the special program aired by ABC, and CLC coordinators reported an increase in calls and walk-ins from 40 to 300%.

Table 6 illustrates the relationship of media activity to use of the 800 number. The figures in each cell, provide the number and the percent of calls for each month.

The following table provides a breakdown of the various types of publicity reported by clients who called the referral service and the number and percentage of calls that were generated by the publicity.

TABLE 6

MEDIA COVERAGE, NUMBER AND PERCENT OF REFERRALS BY MONTH

January	No 800 calls	February	No of 800 calls
Media		Media	
Safeway Bag		Safeway Bag	
TV		Chinese Newspaper	
KCBS-radio		KCBS	
Channel 5		KLOK	
Channel 7		TV	
Sunset Magazine	168/15.68%	Channel 5	85/7.93%
SF Chronicle		Channel 7	
Office Memo		PG&E Newletter	
Co-op Newsletter			
CLC Program			
PG&E Newsletter			
March		**April**	
Safeway Bag		Safeway Bag	
TV		TV	
Channel 7	34/3.17%	Channel 7	26/2.42%
		Channel 5	
		Radio	
May		**June**	
Library		Radio	
Tutor		KMEL	
FM-radio	15/1.40%	KJAZ	46/4.29%
Channel 7		TV	
		Channel 7	
		Channel 5	
		Library	
		Newspaper	
July		**August**	
Safeway Bag		Safeway Bag	
Career Center		Radio	
Readers Digest		KBLX	
Friend	69/6.44%	TV	81/7.56%
Poster		Channel 7	
Library		CLC Program	
Channel 7		Poster	
		Magazine	
		Family Life Progress	
September		**No of 800 calls**	
Safeway Bag	CLC Program		
Radio	TV		
KBLX	Channel 2		
KBAL	Channel 4	547/51.07%	
Channel 7	Channel 9		
Channel 11	Channel 32		
Channel 44	Channel 60		
Friend	Co-op Newsletter		
Bus	Merrit College		
Poster	PG&E Newsletter		

MOST IMPORTANT MEDIA INFLUENCE

Since the media component is such an important component for a referral service, it seemed necessary to document the impact the media had on the use of the referral service. To accomplish this the answering service staff was told to ask clients calling the referral service where they heard or saw the 800 number. Program coordinators were also asked to obtain media information when possible and to report it on the Data Collection Log.

Based on data supplied by the answering service and program coordinators, television was by far the most influential medium and generated the greatest number of 800 referrals. Although when interviewed by program staff, many callers said they could not remember where they heard the toll-free number, 58% of those responding cited television as the source of information (see Table 7). One television program cited most often (73 times) was the 20/20 special on Literacy, hosted by Ted Kopel. Radio was cited as the next influential source of information with 9%, the Safeway Bag was next with 3%, followed by newspapers and libraries. There was also a category of "other" which included those clients who gave no source of information as well as clients who cited many different sources. Some of these other sources cited were:

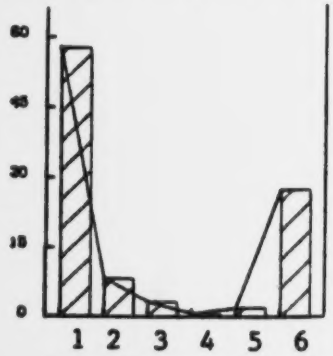
- Chinese Newspaper
- Co-op Newsletter
- Office memo
- PG&E Newletter
- Posters
- Reader's Digest
- Sunset Magazine
- Time Magazine
- Volunteer Bureau of Santa Cruz

Table 7 provide a breakdown of media sources cited and reported by the answering service and CLC coordinators.

TABLE 7

PERCENTAGE OF CALLS GENERATED BY THE MEDIA

Media	# Calls	% Calls
1. TV	618	58%
2. Radio	93	9%
3. Safeway Bag	37	3%
4. Library	7	-1%
5. Newspaper	21	2%
6. Other	295	28%



VIII

MANAGING BALRN

STAFFING

The original staffing plan for BALRN allowed $30,000 for salaries of project staff. This amount included contracting for a half-time consultant to manage the project and subcontracting for a half-time support staff person for 12 months. Added to the staff was a part-time (as needed) computer program specialist hired to design a data management program and to automate and input the data. The computer programmer was a student with an engineering background and specialized training in computer technology. The project was able to hire him for almost one-fourth the cost of a professional programmer.

Although the project consultant was hired for half time, the amount of time required to manage the project varied from half to full-time. For example, the start-up of the project scheduled for November 1, was delayed until December but the schedule for initiating the service remained January 2. The project manager was required to work full-time to develop the necessary instruments and referral tools, conduct training for the answering service, and prepare them for the January 2 start-up date.

Extension of the service to include other CLC programs and libraries that had not been included in the original plan, the unpredictability of the number of referrals, the need to constantly update and revise the referral instruments, the time required for data entry and refinement of the data, the need to be involved in publicizing the service through local media channels, the reporting needs of the project, the amount of time needed to analyze the data and write the reports and other activities and tasks that are always time consuming when working with groups, required the project manager to work as needed to complete the tasks regardless of the time involved.

ROLE OF PROJECT ADVISORS

The BALit program coordinators were very much a part of the project. The project manager reported each month to the BALit advisory group on the progress of the study, and provided a report monthly, on the number and status of callers, and a breakdown on the number of calls by time of day and days of the week. During their meetings BALit members also advised the project manager and provided input and suggestions on procedures for collecting program data, design of the instruments used by the answering service operators, as well as feedback on the

quality of interaction with the operators and accuracy of referrals to the local programs.

There is no one pattern of staffing that is best for a service of this nature. Staffing should be determined by the individual needs of each project and the clients who are the recipients of the service. The one factor that will have the most impact on how the project is staffed however, is the amount of media activity being conducted to advertise the service and the number of calls generated as a result of the publicity. Related to that is the process used to provide programs with contact information, the strategies employed to monitor the accuracy of referrals, the information needs of the project, the frequency with which the referral database is updated, and the number of affiliate groups who need to be informed and updated on the activities of the program. Had BALRN received the original number of calls projected each month (400) with the extended service, project staff would not have been able to handle the volume of calls with the small staff allocated for the project.

The following staff responsibilites are suggested only as general guidlines for initially establishing a referral service and are based on the tasks performed by the BALRN staff. Many of these tasks will not need to be done once the program is firmly implemented. Responsibilities are grouped by management, clerical and technical tasks.

MANAGEMENT/COORDINATION

- Develop management plan and confer with project advisors or supervisor on the accuracy of planned tasks.
- Develop criteria and outline to interview telephone answering agency.
- Conduct interviews with answering service agencies and select service.
- Set up toll-free number with telephone carrier and answering service.
- Hire support staff.
- Obtain input from appropriate advisors on design format and content of training and referral protocols.
- Develop protocols, guidelines and the process for routing referrals from the telephone answering service to the local programs.

- Submit instruments to advisory group for review and make revisions. Make supplemental revisions and update materials as needed during the project.

- Develop workshop plan, schedule and conduct initial training with answering service staff and whenever revisions are made to the materials.

- Establish procedures for monitoring the quality of the interaction between the answering service operators and and callers.

- Monitor, evaluate and provide feedback to the telephone service staff on the accuracy of information and referrals and the quality of customer satisfaction.

- Develop appropriate resources and information formats to communicate the status of the project to a variety of participtants and program affiliates, verbally and in writing.

- Develop public service announcements for airing on local radio networks and T.V. channels when invited and provide interviews to the press when requested.

- Develop interview schedules and conduct interviews with appropriate programs participants.

- Handle day to day problems associated with establishing a referral service.

- Design appropriate tools and measures to assess program effectiveness.

- Hire computer program specialist.

- Select data management system to organize data and for data analysis.

- Collect and analyze data.

- Write quarterly and final project reports.

CLERICAL SUPPORT

- Perform general secretarial responsibilities of typing correspondence, reports, designing forms, organizing and managing project files, and maintaining records on the number of calls to the referral service.

- Maintain files on raw data.

- Monitor referrals for accuracy.
- Revise and update referrals instruments as needed.
- Send out contact information daily to programs participants.
- Prepare data collection logs and tally sheets with composite lists of referrals and mail to program participants on schedule.
- Prepare returned data collection logs with coded information for data entry.
- Maintain daily count of referrals and prepare monthly update report on the status of calls.
- Develop and print computerized mailing lists in anticipation of targeted mailings.
- Conduct follow-up of "other calls" to make sure the clients needs are addressed.

TECHNICAL TASKS

- Confer with project manager in the selection of a data management program.
- Design program according to project specifications.
- Automate programs with computer system.
- Refine data management system.
- Perform data entry as data are collected.
- Refine data, and print reports.

All the tasks outlined above were performed by BALRN staff and are listed here to illustrate the level of commitment required to establish the BALRN model.

COMMUNICATION PLAN

In addition to BALit members who initiated the project and who were the project advisors, there were a number of other library groups who were interested in BALRN. For those participating and affiliated with the project it was necessary to keep them updated about the status of the project, and to

communicate general information about the project to others. To respond to the communication needs of the project, a variety of reporting formats were developed. BALRN maintained a communication relationship with five library affiliates and disseminated information to them on a regular basis. They included the following groups:

1. BALIS (Bay Area Library Information System) and other Northern California Library Systems

2. BALit (Bay Area Literacy), sponsors and program advisors

3. CLC Library participants

4. All Library directors in Northern California

5. Non-participating CLC libraries

6. Contact Literacy (National Literacy Hotline).

The formats developed to communicate information about BALRN included the following:

1. The BALRN Fact Sheet - for wide dissemination - a brief overview on the who, what, when, where and how of the project.

2. The BALRN Monthly Update - for BALit members. A monthly summary report on the number and status of 800 referrals by CLC program. A format developed in response to BALit members wanting a reporting device which could be scanned to quickly view program totals and client status without descriptive text.

3. The Quarterly Update - a two page newsletter for systems coordinators, library directors, BALit members and CLC program coordinators to update library affiliates on the activities and progress of BALRN.

4. Quarterly Reports - for BALit members, the BALIS coordinator and State Library Staff. A detailed description and documentation of project activities in progress.

5. General Correspondence - with the National Literacy Hotline in Lincoln Nebraska, to explore the feasibility of linkages between the national toll-free service and the regional toll-free service, and others interested in the project.

FEASIBILITY OF LINKAGE WITH THE NATIONAL 800 NUMBER

A number of telephone discussions were held with the director of Contact Literacy in Lincoln, Nebraska to explore the feasibility of establishing an automatic relay system with the BALRN 800 number. The concpet was that a person calling the national number from any one of the area codes in the BALRN 800 toll-free area would be relayed automatically (unknown to the caller) to the regional 800 number.

Contact Literacy was not in favor of the hookup because of their need to screen incoming calls. An automated relay system would eliminate that possibility. Of particular concern was their capability to respond to the hearing impaired with their TDD system and to screen those callers who were seeking information not related to program referrals. The national number has the ability to provide information on literacy programs that BALRN does not have.

While the automatic hook-up seems possible at first glance, after researching the possibility with AT&T and PacBell, it was concluded that the drawbacks under the current communication climate preclude the possibility of successfully negotiating a hookup between the two 800 number systems.

A more basic concern is the comprehensiveness of the national database used to make literacy referrals to programs in California. The number of literacy providers is enormous for California, and an out-of-state database is not expected to be as comprehensive because of the volume of programs, the need to update information frequently and the problem of distance which results in many inaccurate referrals. Even in establishing BALRN, the referral database of the operators needed to be updated frequently.

Given the apparent drawbacks and information needs of California Literacy providers, the screening needs of Contact Literacy and the problem of distance, a statewide number would appear to be more desirable for literacy assistance within the state. Furthermore, it seems more feasibile to explore the technology required to establish a toll-free service within the state if the State Library is planning to implement a statewide system of referral.

CHAPTER IX

MAKING THE TRANSITION

OPERATING BUDGET

BALRN operated on a relatively small budget of $50,000, of which $30,000 was allocated for salaries, $15,000 was allocated for telecommunications and telephone charges and the remaining $5,000 was allocated for general operating expenses.

The original budget for the telecommunication charges was based on a projected estimate of 400 calls per month. Lack of a planned media component to support the service resulted in the project receiving only 30% of the number of calls projected and under spending of the budget by approximately $7,000. A request was made to the State Library and approval was granted to use the unexpended funds to develop a media package to advertise the referral service. A print package for Bay Area CLC programs was developed and is currently available for dissemination from the BALit program coordinators.

Some basic resources needed to manage BALRN in addition to the usual office equipment, furniture, facilities and support staff were:

- A computer programmer
- In-kind support from the fiscal monitor
- Computer access and in-house capability
- Data Entry
- Operating (other than answering service and PacBell)
  - -Software
  - -contact information
  - -mailing lists
  - -mailing labels
  - -communication tools
  - -office space

COST OF THE TELEPHONE SERVICE

A summary of costs for the toll-free service and telecommunication charges indicate that the service is

economical. Charges were analyzed by month and broken out by answering service and PacBell with the number of calls and charges for each agency. Total costs of the telephone service for the 800 number for nine months amounted to $1,950 or an average of $217 per month for the 1071 referrals verified by BALRN from the answering service. Included in these charges is the one time non-refundable installation fee charged by both the answering service ($50) and the telephone carrier ($70).

Because they are two different systems with two different billing schedules that overlap, there is a difference between the number of calls recorded by the answering service, PacBell and the program each month. PacBell charges exceed those of the answering service by approximately 50%. Furthermore the criteria used by each agency for a completed call is different. The answering service does not charge for incompleted calls or hang ups, while the telephone company charges for all calls that connect with the answering service whether completed or not.

The answering service charges a base fee of $50 each month (this fee can often be negotiated), for a minimum number of calls. For example, the base fee for BALRN was $50 per month for a minimum of 75 calls, and 25 cents for each call over the minimum 75. So, whether the service received one call or 75 calls during the month, the charges from the answering service amounted to $50. When the calls exceeded 75, the monthly charge was $50 plus 25 cents for each call over the minimum 75. The result was the average cost per call was lower when the volume of calls was highest. This held true for both services. The period between the months of March and May when calls were at their lowest, and September when calls were at their highest, clearly illustrate this concept. The average cost per call in March was $2.85 when the number of calls received for the month was 34, in May it was $4.94 per call when the number of calls received for the month was 16, while in September when the number of calls received for the month was 547, the average cost per call was .87 cents. Overall, the average cost per call was $1.82 for the 1071 calls. Which is an argument for supporting the service with a media campaign since there is an obvious correlation between media coverage and use of the service.

CONTINUING BALRN

Four months prior to the end of the study, BALit members were asked by the State Library Consultant to make a decision about continuing or discontinuing BALRN. To assist BALit members in making a decision, the project manager developed two examples of estimated costs to continue the program with minimum, medium and maximum budgets and formulae for allocating costs among BALit members. A committe was assigned to review the examples and to make a recommendation regarding the future of the referral service.

Based on the information presented, the cost effectiveness and the performance of the answering service, BALit made a decision to continue the service. They decided to support BALRN out of local program funds, and came up with their own formula for funding the project. To off-set some of the costs, the BALit committee solicited new memberships and was successful in recruiting two new non-CLC members to the program and retaining one CLC program that was not a BALit member.

Each member is charged an annual fee of $337.50 for the service. The current plan calls for no new members for four months to determine first how well the program operates without the developer. Once the decision is made to accept new members, they will be accepted on a quarterly basis, and annual membership will be prorated according to formulae decided upon by BALit. In addition to the annual fee (which may be higher than the $337.50 for first time members) new members will be required to pay a joining fee of $40 to supplement the cost of staff time required to update and revise the Referral Guide.

The program is being administered by the coordinator of the Alameda CLC City Library Program who volunteered to take on the responsibility. The program is operating with the minimum budget derived from the membership of 16 members @ $337.50 per program or a total of $5,400. Staff include the program coordinator, who volunteers her time for BALRN and a paid clerk, who works four hours per week at $10 per hour. The clerk is responsible for picking up the referral slips and mailing out contact information weekly. Only members of BALRN receive contact information on the 800 referrals, but member programs do make second referrals to other literacy providers when appropriate.

The budget for continuing BALRN is admittedly minimal and is not recommended for other groups. And since there is no planned media campaign, they may very well succeed in maintaining the program at the minimum budget for their current membership. However, it is speculated that new memberships will be prorated using different formulae and the result will be an increase in the costs for new memberships.

START UP AND MAINTENANCE OF BALRN

Some thought was given to the replication and maintenance of BALRN and what those costs would look like with a paid professional, support staff person and a computer programer. Anyone starting up a referral service or replicating BALRN should understand that the examples provided only serve to illustrate a range of costs required to set up an initial referral service, and to maintain the service with minimum staff and the required resources once the service has been tested and

is ready to be implemented. The suggested resources are based on the experience of BALRN. Budgets are based on the assumption that all expenses will have to be paid for by the project. But each project will be different and costs should be estimated on the bases of resources needed by each program.

A program might be able to get in-kind support for the project, and could get by with considerably less than the costs illustrated in budgets one and two, as BALRN is currently doing. The following budget configurations are presented to provide realistic examples, and as guidelines for consideration. Exhibit one is staffed with a professional and a support staff person for three-quarter time and a part-time technical staff person.

EXHIBIT 1

BUDGET FOR SETTING UP AND TESTING A REFERRAL SERVICE

CONSULTANT SERVICES:	
Professional staff services, 3/4 time	
1560 hrs @ $20/hr.	$31,200
Support staff services, 3/4 time	
1560 hrs @ $12/hr.	18,720
Computer program specialist, part-time	
400 hs @ $12/hr.	4,800
SUPPLIES AND MATERIALS:	
Office supplies and consumable material for	
12 mo x $75/mo	900
Office space, 12 mo @ $100/mo	1,200
Reprograghics, 12 mo @ $75	900
Printing, letter head and stationary	500
COMMUNICATIONS:	
Postage	1,200
Computer time	500
Telephone charges, 12 mo @ $75/mo	900
Telephone answering service, 12 mo @ $150/mo	1,800
one time set up chg of $50.	50
PacBell service, 12 mo @ $300/mo	3,600
one time set up chg of $70.	70
TRAVEL:	
Local travel to answering service agency	200.
Total estimated cost without Media Component	$66,540

Exhibit two, presents an estimate of costs for a half-time professional staff with a data entry clerk, to maintain the service for one year once it has been tested and is ready for implementation. These figures, as are those in exhibit one, are based on the assumption that there will be a planned media campaign, and the membership will be considerably larger than the 27 CLC participants involved in the test phase of BALRN or its' current membership of 16 programs.

EXHIBIT 2

BUDGET FOR MAINTAINING THE SERVICE ONCE IT IS ESTABLISHED

CONSULTANT SERVICES:	
Professional staff person, 1040 hrs @ $20/hr	$20,800
Data Entry clerk, 520 hrs @ $12/hr	6,240
Office space, 12 mo @ $100/mo	1,200
SUPPLIES AND MATERIALS:	
Office Supplies, and local travel to answering service	480
Reprographics, printing and xeroxing	1,000
COMMUNICATIONS:	
Postage, mailing of contact information to member programs	1,200
Telephone answering service for 12/mo @ $150	1,800
PacBell service for 12/mo @ $300/	3,600
Total estimated costs	$36,320

THE TRANSITION

There are some things the manager needs to do to orient the successor to the program and to facilitate a smooth transition and uninterrupted service. They are:

1. Notify the answering service that there will be a change in staff (and billing address) at least two months in advance of your leaving.

2. Notify the telephone carrier that there will be a change in the fiscal agent (and billing address) at least one month in advance of your leaving.

3. Meet with your replacement at least two months in advance so that there will be ample time to review all procedures and referral instruments.

4. Take your replacement to the answering service and introduce him or her to the individual supervisors and the operators so they can get acquianted with the staff and get an explanation about how the answering service works.

5. Update the referral tool.with new names and addresses if necessary.

6. Get letterhead and stationary printed (if your program has money).

7. Update the mailing lists and print mailing labels.

8. Notify appropriate affiliates of the change and date the transition will take effect.

9. BE AVAILABLE FOR ASSISTANCE IF NEEDED.

RESPONSIBILITIES OF SERVICE COORDINATOR

The following, are tasks to be accomplished for the coordinator, assigned volunteer or staff person who will have the responsibility of maintaining the referral service.

1. Revise and update referral guide as needed

2. Pick up 800 inquiries on a regular basis

3. Develop and maintain a file for each program member

4. Send 800 contact information to programs within five days of initial inquiry

5. Develop record keeping system to verify impact of service

6. Organize information for data entry

7. Maintain mailing labels

8. Meet with answering service supervisors to resolve problems quickly

9. Review updated referral information with operators

10. Organize and report program status to affiliate members

11. Prepare monthly stat reports on number of callers

12. Develop a format for communicating information about the program

13. Update mailing lists quarterly for new memberships

14. Maintain rapport with answering service staff

BALRN was designed to be easily implemented once the underlying structures are in place. These include: 1) planning and setting up the system with a carefully chosen answering service agency, 2) designing referral tools and conducting orientation, 3) selecting the telephone carrier to obtain the 800 number and the appropriate toll-free service, and 4) planning and implementing a publicity campaign to advertise the service. One important component that is also part of the structure and often overlooked is the information and reporting need of the project to document what the project accomplished and the impact the service had on the program.

The primary purpose of collecting information is to aid in the decision process, either present or future. It is imperative for anyone planning to establish a toll-free service to understand the importance of collecting, at minimum, data that will verify impact and assist in future decision making. Some of the questions that need to be asked during the initial planning process are:

- Why is information needed?
- What information is needed?
- How is the information to be used?
- When is the information needed?
- Who will use the information?
- From whom should the information be collected, and
- How often?

Answers to these questions will assist the developers in focusing the information needs and in designing strategies to meet the programs' objectives.

PRELIMINARY RECOMMENDATIONS

Preliminary recommendations were made by BALRN based on an early assessment of the effectiveness of the service both in terms of costs and performance. The focus of the preliminary recommendations is on maintaining the service as it was developed and with the support of a media campaign to increase the use of the service. All the preliminary recommendations have been partially or completely implemented.

RECOMMENDATION No. 1: Continue the toll-free referral service with state supported funding.

RECOMMENDATION No. 2: That the State Library also fund a marketing campaign to publicize BALRN, and to build awareness of the system among the target audience.

RECOMMENDATION No. 3: That the service maintain its current name - Bay Area Literacy Referral Network (BALRN) since it is already established.

RECOMMENDATION No. 4: That BALRN remain with the current commercial service in Alameda, which was instrumental in helping to develop the service and whose operators have become proficient in making timely and accurrate referrals.

Because of the early success of BALRN, the 13 BALit CLC coordinators who initiated the idea for the project decided to continue the service, and to support it with funds from their local programs. It is currently being operated with a small budget and supported entirely by the 13 CLC projects, augmented with the subscription of two new members and one CLC program (two non-CLC programs, Berkeley Literacy Volunteers of America (LVA) and the Livermore Public Library (PL) and; the Salinas CLC library program).

BALRN is being administered by the coordinator of the Alameda City CLC Library Program, and as recommended, remains with the Alameda Answering Service. Only members of BALRN receive contact information on the 800 referrals, but member programs continue to make second referrals to other literacy providers when appropriate. Callers to the 800 number wishing to contact an out of state program are automatically referred to the National Literacy Hotline by the answering service operators. The national number was included in the last revision of the Referral Guide. Operators were alerted to the inclusion of the National number and given instructions to refer callers wanting a referral outside of the toll-free area, to the National Literacy Hotline.

SUGGESTIONS TO ENHANCE THE OPERATION OF THE PROJECT

- Involve the answering service staff in the program at the beginining to establish rapport and throughout the program whenever possible to maintain rapport.

- Get input from participants on the development of instruments, and submit them for review before they are finalized.

- Field test referral instruments with the operators before the service is initiated to determime their ease of use and level of accuracy.

- Communicate on a regular basis with answering service operators to let them know when there are problems, and to let them know when they are doing a good job.

- Do a preliminary analysis of sample data to determine what patterns of information are emerging before selecting the data management program. These patterns will influence how the data management program is designed and how to get from the data, information needed to satisfy the reporting needs of the program.

- Allow adequate time for data entry, refinement and analysis of the data.

CONCLUSIONS

BALRN provides a basic model for establishing an 800 referral service with a commercial telephone agency. Essential to the success of the service are operators who are patient and sensitive to the callers and a media component to advertise the service. Those wishing to replicate the model can replicate it as it was developed or select from it those components that address their service needs and adapt them to fit the design of their program.

Use of a commercial answering service with a toll-free number to provide access to literacy assistance has some advantages over the more traditional models. With this model service is available at all times and the caller always receives the personal attention of an operator trained to interact with the client population. One call provides the client with a local program and contact person and they can quickly follow-up the referral on their own initiative. Recruitment of clients is expanded beyond the range of publicity engaged in by individual programs and all benefit from a single ad or public service announcement. The toll-free zone(s) enables potential learners and tutors to call from a wide geographical area and publicity can be targeted to recruit the category (learners or tutors) of participant needed for the program. Finally, the model is considerable less expensive than the costs of maintaining staff to provide this type of service.

APPENDIX

CLC LIBRARY PROGRAMS WHO PARTICIPATED IN BALRN .

Alameda County Free Library
Hayward, CA*

Alameda (CITY) Free Library
Alameda, CA*

Auburn-Placer County Library
Auburn, CA

Butte County Library
Oroville, CA

Contra Costa County Library
Pleasant Hill, CA*

Eureka-Humboldt County Library
Eureka, CA

Fresno County library
Fresno, CA

Marin County Free Library
San Rafael, CA*

Mendocino County Library
Ukiah, CA

Menlo Park County Library
Menlo Park, CA*

Merced County Library
Merced, CA

Modoc County Library
Alturas, CA

Napa City-County Library
Napa, CA*

Oakland Public Library
Oakland, CA*

Richmond Public Library
Richmond, CA*

Sacramento Public Library
Sacramento, CA

Salinas Public Library
Salinas, CA

San Francisco Public Library
San Francisco, CA*

San Mateo Public Library
San Mateo, CA*

Santa Clara/Milpitas Library
Milpitas, CA*

Shasta County Library
Redding, CA

Siskiyou County Library
Yreka, CA

So. San Francisco/Daly City
South San Francisco, CA*

Stockton/San Joaquin Co. PL.
Stockton, CA

Watsonville Public Library
Watsonville, CA

Woodland Public Library
Woodland, CA

San Mateo County Library
c/o Peninsula
Belmont, CA**

**This program is a BALit member but because it is in the county jail it did not receive any referrals from the referral service.

NUMBER AND PERCENTAGE OF CALLS RECEIVED EACH MONTH BY STATUS

Month	# Learner	# Tutor	# Info	Total	Percent
Jan	81	50	37	168	15.68%
Feb	36	35	14	85	7.93%
Mar	15	13	6	34	3.17%
Apr	8	13	5	26	2.42%
May	6	7	2	15	1.40%
Jun	16	10	20	46	4.29%
Jul	35	16	18	69	6.44%
Aug	43	15	23	81	7.56%
Sep	238	214	95	547	51.07%
Totals	478	373	220	1071	99.97%

INTERVIEW GUIDE FOR ANSWERING SERVICE STAFF

THIS INTERVIEW GUIDE WAS DEVELOPED TO ASSIST IN THE COLLECTION OF DATA NEEDED TO EVALUATE THE 800 REFERRAL SYSTEM. THE GUIDE SHOULD BE USED FOR INTERVIEWING CALLERS WHO CALL THE 800 NUMBER, AND FOR REFERRING THEM TO THE APPROPRIATE LIBRARY (CLC) PROGRAMS.

START

1. ADULT READING PROGRAM, (SAY IT TWICE)

PAUSE

2. DO YOU WANT TO LEARN TO READ?

PAUSE

3. I WILL NEED SOME INFORMATION SO THAT I CAN REFER YOU TO THE READING PROGRAM NEAREST YOU. BUT FIRST I WANT YOU TO KNOW THAT ALL OF THIS INFORMATION WILL BE KEPT CONFIDENTIAL.

PAUSE

4. NOW MAY I HAVE YOUR NAME? PLEASE SPELL IT._____
TELEPHONE NUMBER WHERE YOU CAN BE REACHED?_____
(IF NO PHONE ASK FOR AN ADDRESS WHERE THEY CAN BE REACHED)
THE CITY WHERE YOU LIVE OR MAJOR CITY YOU LIVE NEAR?

PAUSE

5. PLEASE HOLD WHILE I LOOK UP THE PROGRAM NEAREST YOU.

PAUSE

6. THE LIBRARY AND PERSON YOU SHOULD CONTACT IS:_____

PLEASE CALL DURING OFFICE HOURS.

PAUSE

7. YOU MAY HAVE TO LEAVE A MESSAGE AND THE PROGRAM WILL GET BACK TO YOU. IS THAT ALRIGHT? Y_____N_____.

PAUSE

8. IS IT OK TO LEAVE A MESSAGE FOR YOU? (ASK ONLY IF THEY HAVE A PHONE)

PAUSE

9. HOW DID YOU HEAR ABOUT THE 800 NUMBER? WHEN WAS THAT?

THANK YOU FOR CALLING.

MR:3/86

THE REFERRAL GUIDE

The following Library programs are participating in the Bay Area Literacy Referral Network. People will be calling the 800 number from the Northern part of California to inquire about the "Reading Program", as Learners or Tutors.

The "Referral Guide" was developed to assist you in making accurate program referrals. "The Guide" has been alphabetized to make it easier for you to use. Note that the page is divided into four areas: by city, contact person, library and telephone number. The pages are also keyed on the top, upper right side of each page with the names of two cities.

The name of the city that appears just to the left is the first city on the page. The name of the city that appears on the right, is the last name on the page. "The Guide" has also been tabbed to make it easier to find the city where the library program is located.

When a caller calls to inquire about a reading program, locate the city they are calling from in the "Guide" and refer the caller to that program. In some cases, the person calling will live in an area where there is no CLC program. In that case you should ask them for the largest city nearest them, and refer them to that CLC program.

An interview guide is also included as part of the "Referral Guide" to assist you in collecting the data needed for the project. If a person calls and refuses to give their name and number, get as much information as you can. If there is other information that is offered by the caller, please record it on the call slip. At minimum, get the name telephone number of the caller, and the city the caller is calling from, where they heard the 800 number, and whether or not they wish to become a Learner or Tutor. In cases where there are no programs in the locality of the caller, they are referred to the nearest CLC program.

Please let me know if you have questions or suggestions about the referrals or the materials that will make it easier for you to do your job, and to make accurate referrals.

I appreciate your cooperation, patience and enthusiasm, and I am looking forward to a very productive working relationship.

Margaret Robinson

CITY	CONTACT PERSON	LIBRARY/PROGRAM	TELEPHONE
A			
AGNEW	BRENDA GRAY	SANTA CLARA-MILPITAS	(408) 262-1349
ALAMEDA	DIMITY JEFFERIS	ALAMEDA CITY	(415) 865-2454
ALAMO	CAROLE TALAN	CONTRA COSTA COUNTY	(415) 944-3358
ALBANY	SECOND START	OAKLAND PUBLIC LIB.	(415) 273-3432
	OR		
	CHARLENE BLACK	RICHMOND PUBLIC	(415) 620-6565
	OR		
	ROZANNE MILLER	LITERACY VOL. PROGRAM	(415) 540-1241
ALMONTE	PHILIP MACDONALD	MARIN COUNTY FREE	(415) 499-7473
ALTO	PHILIP MACDONALD	MARIN COUNTY FREE	(415) 499-7473
ALTURAS	JIM HALVERSON	MODOC COUNTY	(916) 233-3939 X330
ALUM ROCK	BRENDA GRAY	SANTA CLARA-MILPITAS	(408) 262-1349
ALVISO	BRENDA GRAY	SANTA CLARA-MILPITAS	(408) 262-1349
AMADOR CITY	ROZANNE MILLER	LITERACY VOL. PROGRAM	(415) 540-1241
ANGEL ISLAND	PHILIP MACDONALD	MARIN COUNTY FREE	(415) 499-7473

CITY	CONTACT PERSON	LIBRARY/PROGRAM	TELEPHONE
ANGWIN	DEBORAH ESSOE	ST. HELENA	(707) 963-5244
ANNAPOLIS	FRANCES WILLIAMS	NAPA CITY-COUNTY	(707) 253-4283
	OR		
	PHILIP MACDONALD	MARIN COUNTY FREE	(415) 499-7473
ANTIOCH	CAROLE TALAN	CONTRA COSTA COUNTY	(415) 754-8317
APPLEGATE	JAMES ELSAAS	AUBURN-PLACER COUNTY	(916) 823-4168
ARCATA	LILLI SOMMER	EUREKA-HUMBOLDT COUNTY	(707) 445-3655
ASTI	FRANCES WILLIAMS	NAPA CITY-COUNTY	(707) 253-4283
AUBURN	JAMES ELSAAS	AUBURN-PLACER COUNTY	(916) 823-4168
B			
BAYSIDE	LILLI SOMMER	EUREKA-HUMBOLDT COUNTY	(707) 445-3655
BECKWORTH	JIM HALVERSON	MODOC COUNTY LIBRARY	(916) 233-3939
BEL AIRE	PHILIP MACDONALD	MARIN COUNTY FREE	(415) 499-7473
BELLE VISTA	WENDY REYNOLDS	SISKIYOU COUNTY PUBLIC	(916) 842-5027
BEL MARIN KEYS	PYILIP MACDONALD	MARIN COUNTY FREE	(415) 499-7473
BELMONT	MARUA OKAMOTO	SAN MATEO	(415) 341-3425

BAY AREA LITERACY REFERRAL NETWORK

CONFIRMATION MEMO

Date:

TO: Name of Program and Program Contact

FROM: BALRN

SUBJECT: Confirmation of 800 referrals

Directions for completing the "Log"

Use the weekly "confirmation memoranda" from BALRN to verify the callers listed on the "Log" sheet. If the information is incomplete, (e.g. one name, no number, wrong number) that is the information the caller chose to give, and it is left up to them to contact your program.

The rest of the instructions correspond by number, to the column numbers on the "Log".

1. Date caller called the 800 number (provided by BALRN).

2. Name given the answering service (provided by BALRN when possible, but may require that you provide full name).

3. Sex of caller.

4. Date the caller called: indicate when the caller contacted your program.

5. Status of caller: indicate whether the caller is a learner, tutor or wanted information (provided by BALRN when possible).

6. Indicate the actual date of enrollment. If the person did not enroll, please leave blank.

7. Indicate where the person heard the 800 number: TV, radio, newspaper, magazine, etc.

8. Indicate where the caller was referred (e.g. community college, ABE program, literacy volunteers, etc.).

9. Leave the totals column blank.

10. Indicate the number of people who contacted the program to become learners or tutors who did not use the 800 number.

11. Indicate how many of these non-800 inquiries in #10 enrolled in your program.

CALIFORNIA LITERACY CAMPAIGN

BAY AREA LITERACY REFERRAL NETWORK

Contact____ _____

Program _____

Date Sept. 30, 1986

Referral Dates Sept. 15-30, 198

BALRN Data Collection Log for CLC Programs

L=Learner T=Tutor I=Information

1. Date of 800 Call	2. Name of Caller	3. F/M	4. Date Caller Contacted your Program	5. L	T	I	6. Date Caller Enrolled in your Program	7. Where Did the Caller Hear About the Program	8. Was the caller referred to another program? Please indicate where.
9/16	Alexis Donaville	F		x					
9/15	Cassandra Harris	F		x					
9/15	Mr. Jamerson	M			x			TV	
9/15	Stan Buergan	M				x			
9/15	Becky Gross	F		x					
9/16	John Adams	M		x				TV	
9/16	Mary Benson	F		x				TV	
9/18	Victoria Barbero	F		x				TV	
9/17	Ruthann Miller	F			x			TV	
9. Totals									

59

71

72

10. How many inquiries were received from tutors or learners that were not from the 800 number?_____

11. How many of these inquiries resulted in enrollment in your program?_____

Return by:_____

Return to:
Margaret Robinson
BALRN
125 - 14th St. Rm. 6
Oakland, CA 94612-4397

6/86

CALIFORNIA LITERACY CAMPAIGN

TALLY SHEET FOR NON-CLC PUBLIC LIBRARIES

Library Sunnyvale Pub Lib

Date Sept. 1, 1986

Please provide the information requested below by filling in or checking the appropriate columns, and return the form to BALRN by the date requested. Retur the form even if you do not get any referrals.

L=Learner T=Tutor

Date your program contacted	Name/location of caller	T	L	Was the caller referred from a CLC program	Was call direct inquiry	What happened to t caller
Totals						

Comments: _____

_____

_____

Return by: _____ 1986

to: Margaret Robinson, BAL
125-14th St. Rm. 6
Oakland, CA 94612-43

BALRN MONTHLY UPDATE

Month of May

CLC PROGRAM	800 CALLS	# OF NON 800 CALLS			MEDIA COVERAGE			
		L	T	I	RADIO	TV	OTHER	UNKNOWN
ALAMEDA CO PL								
ALAMEDA CITY PL								
AUBURN PLACER CO								
BUTTE CO LIB								
CONTRA COSTA CO	3	1	1	1	1	1	1	
EUREKA/HUMBOLDT								
FRESNO CO LIB								
MARIN CO FREE								
MENDOCINO CO LIB								
MENLO PARK								
MERCED CO								
MODOC CO								
NAPA CITY CO								
OAKLAND PL	5	2	2	1			2	
RICHMOND PL								
SACRAMENTO PL	1			1				1
SALINAS PL								
SAN FRANCISCO PL	3		1	2			1	1
SAN MATEO PL								
SANTA CLARA/MILPITAS	3	1	1	1		1	1	1
SHASTA CO PL								
SISKIYOU CO								
SO SAN FRANCISCO	1		1		1			
STOCKTON/SAN JOAQUIN								
WATSONVILLE								
WOODLAND PL								
TOTALS:	16	7	6	3	2	4	3	7

L=Learner; T=Tutor; I=Information

BREAKDOWN OF CALLS

SUMMARY OF CALLS

LEARNERS: 7
TUTORS: 6
INFORMATION: 3
OTHER: 0

TOTAL 16

OF CALLS PER/WEEK

WEEK OF: May 1 1
WEEK OF: May 4 6
WEEK OF: May 11 2
WEEK OF: May 18 4
WEEK OF: May 25 3

TOTAL 16

TIME OF CALLS

8am to noon 9
Noon to 4pm 4
4pm to 8pm 3
8pm to 12pm

TOTAL 16

DAYS OF CALLS

MONDAY 2
TUESDAY 4
WEDNESDAY 4
THURSDAY 4
FRIDAY 1
SUNDAY 1

TOTAL 16

BALRN QUESTIONNAIRE

LIBRARY PROJECT DIRECTORS

CLC Program_____

The purpose of this questionnaire is to get a sense of the impact the toll free referral service has had on your program and the level of literacy assistance you provide.

INSTRUCTIONS: Please read each question carefully before answering. Most of the questions are open-ended and some require multiple responses. When responding to the open-ended questions, use the back of the page if necessary. I have tried to ask only those questions that will yield the kind of data I feel necessary to provide closure to this study, and I have tried to keep the questions as brief as possible. I hope it will not consume too much of your time.

Please return the questionnaire WITHIN 5 DAYS in the enclosed envelope. THANK YOU for your cooperation.

QUESTIONNAIRE

1. What impact did the referral service have on your program? Be as specific as possible._____

   _____

   _____

   _____

2. Other than an increase in enrollment and/or visibility, what benefits did your program derive from the toll-free referral service? Please be specific:_____

   _____

   _____

   _____

3. In your opinion, is the toll-free service reaching the appropriate target population? Yes:_____ No:_____

4. Although we have tried to track the number of 800 referrals who enrolled in your program, we probably missed some of them because of conditions over which we had no control. According to your records, how many of the 800 referrals enrolled in your program? Total number_____.

a. Number of Learners?

b. Number of Tutors

c. Number referred to other programs_____

5. Approximately how many clients who contacted your program directly, were enrolled? _____

   a. In your opinion, were these clients influenced by publicity of the 800 number or other publicity efforts?

   _____

   _____

   b. How many of these were Learners?_____

   c. How many of these were Tutors?_____

6. Has the level of non 800 referrals increased significantly or is it about the same as it was before the referral service was established?

   a. increased ( ) _____

   b. about the same ( ) _____

7. Part of the effectiveness of any program is determined by what happens to the client after the program is contacted, and how quickly service is provided. Please respond as accurately as possible to the following questions:

   a. Approximately how many learners referred through the 800 service are now being tutored:_____

   b. Approximately how many tutors referred through the 800 service have been trained, and are now tutoring?_____

9. What is the average length of time tutors are required to wait before they are trained and begin tutoring? _____

10. Has the waiting period increased or is it about the same as it was before the referral service was established? Increased ( )_____ The same ( )_____

11. If the amount of time is considerable between enrollment and teaming, what percentage of learners would you estimate are lost because of the waiting period?_____

    _____

12. Has the referral service affected your ability to provide literacy assistance? Yes ( )_____ No ( )_____
If yes, please explain?_____

_____

_____

13. If the request for literacy assistance should increase significantly because of publicity by the media, describe briefly what will happen to your program. Please be specific._____

_____

_____

14. What resources/services are needed most to continue to provide adequate literacy assistance to the community? If several resources are needed, please list them in order of priority._____

_____

_____

15. In your opinion, do you believe operators at the answering service did a good job? Please be specific._____

_____

_____

16. Do you have any complaints about the answering service or the referral system? If so, please be specific. _____

_____

_____

17. Did any of your clients complain about the answering service? Yes:____No:____ If yes, what was the nature of the complaint(s)?

_____

_____

18. Do you believe the toll free service is cost effective?_____

_____

_____

LD-4

19. In your opinion, who do you think should finance the toll free service?_____

_____

20. In what way has the PLUS campaign affected your program?

_____

_____

21. Do you have any recommendations for a person or organization setting up this type of service? Please be specific.

_____

_____

22. Other comments:

_____

_____

THANK YOU FOR ANSWERING ALL THE QUESTIONS.

MR/9-30

QUESTIONNAIRE RESPONSE

To get a sense of the impact BALRN had on CLC programs and how they felt about the service, a 22 item questionnaire was developed and mailed to 18 CLC coordinators (see Library Project Directors Questionnaire). The 10 questionnaires that were returned represent a cross section of CLC programs located in rural and urban jurisdictions. The following is a summary of the responses to the questionnaire.

IMPACT OF BALRN ON CLC PROGRAMS:

Five programs reported that BALRN had "minimal to very little" impact on their programs because they received few referrals and the ones they received were referred to other literacy or library programs.

Five program coordinators reported that the impact was positive because it increased the number of referrals and inquiries from both potential tutors and students and helped the program speed up service and response time. One program coordinator reported that "while few called the 800 number, many had heard the publicity and chose to call the library directly.

OTHER BENEFITS DERIVED FROM BALRN

The majority of the programs responding indicated that they benefited in ways other than increased enrollment and visibility. Most cited the benefit of being part of a unified media and publicity effort, and felt it was good public relations for the program. One coordinator indicated that networking with other BALit programs was beneficial.

REACHING THE TARGET POPULATION

Nine of the program coordinators indicated that the service was reaching the target population. The program coordinator who felt the service was not reaching the appropriate audience indicated that her program had received very few referrals.

DIRECT PROGRAM CONTACTS

All but one CLC coordinator reported enrolling clients who contacted the program directly. The number of direct contacts who were reported as enrolled in CLC programs ranged from a low of five clients for two programs to a high of 60 each for two programs. Three other programs reported enrollments of 54.5%, 60% and 75%, and the remainder indicated that these figures were not readily available.

INFLUENCE OF BALRN ON PROGRAM CONTACTS

When asked if direct program contacts were influenced by publicity of the BALRN 800 number, the majority of the coordinators responded that contacts were generated by both the regional and national 800 numbers and it was difficult to differentiate between the two. One coordinator reported that direct referrals to the program were generated by other publicity but that the "800 number made it easier to respond" to clients. Another coordinator indicated that national publicity was cited most by those people making direct contact and although information on the status of those clients was not provided, all but three coordinators indicated that non-800 referrals had increased significantly.

FOLLOW-UP AND PLACEMENT

Information reported by program coodinators on the number of learners being tutored and tutors working with learners was incomplete. However, three programs indicated that the waiting time for tutors before they are trained and teamed averages one to six months and has increased since the 800 service was established. The other six programs reported that tutors wait from one to four months before they are trained and begin tutoring and the waiting period has not increased but remains the same.

Five of these programs reported a loss of approximate 10% of their learners due to the waiting period. One program reported less than 5% and another one said that "some move, otherwise not too many are lost, they are willing to wait".

EFFECT ON PROGRAM SERVICES

Only two CLC coordinators reported that the referral service had an effect on their ability to provide literacy assistance. One program indicated a need for more tutors because of increased referrals, while the other one indicated that the service "has improved access to students" and reduced the amount of staff time required to refer clients to other programs.

Program coordinators were asked to describe what would happen to their program if the request for service increased significantly because of the 800 service. Most responded that they would need to increase their budgets, training staff to train tutors and increase their resources for the learners. The waiting period between contact time, tutor training and placement for learners would also increase. One coordinator indicated that waiting time for screening would increase by

three to five weeks and possibly to three months for teaming. Another program indicated they would have to refer volunteers to workshops in other counties.

RESOURCES NEEDED FOR CONTINUATION

Coordinators responded that in order to continue to provide service at the current level, they needed more resource material for both learners and tutors, more space for learner-tutor teams, and increased budgets for additional staff to recruit , screen and train more tutors. More adequate compensation for work, free student assessment capability and tutor consultants to improve the quality of volunteer tutors, and more staff for community college and adult education instructors were also cited

EFFECTIVENESS OF THE REFERRAL SYSTEM

Coordinators who responded about the performance of the answering service and the referral system offered few complaints, except for misspelled names and referrals who were in another county. Seven coordinators indicated they believed the toll-free system was cost effective, and one coordinator added that the level of accuracy was "much higher and the frustration of delay shorter". One coordinator responded that the program was not cost effective for her because of the low percenatage of referrals she received, but she was "willing to support it because it was a worthwhile service". The response of one other coordinator was "not enough data to tell at this point" and one philosophical response was:

> On the surface it may seem . . . cost effective. If we are to continue to make an impact on the number of people who want literacy services, a consistently present referral number is needed.

SUPPORT FOR THE 800 SERVICE

Program coordinators responded in a variety of ways to the question of who should support the 800 service. Their responses were:

- The counties who use it
- State and federal monies
- Library agencies choosing to use the service on a percentage basis
- The Bay Area
- Joint State Library and programs prorated on a per use basis, and
- The State Library

IMPACT OF ABC'S LITERACY PLUS

Since over 50% of the 800 referrals were received in September as a result of BALRN's collaboration with ABC'S PLUS staff at channels nine and four, CLC coordinators were asked how the PLUS Campaign affected their programs. All the coordinators reported an increase in program activity. One program reported a 300% increase in calls during September (and early October). Of these, a total of 195 were received between September 15-30, and 145 of these cited the 800 number. The calls were generated by a combination of both the local and nation 800 numbers. Other programs reported that calls from both learners and tutors had increased, and so did local awareness of the problem. One respondent reported that the PLUS Campaign has increased student calls and drop-ins by 98% and it also increased the number of calls from tutors and "others." One program coordinator reported that the campaign had created "too much work and there was too little staff to handle ...it".

RECOMMENDATIONS FROM CLC PROGRAMS

Program coordinators were asked to share their recommendations based on their experience of participating in the referral service. They offered the following responses:

1. Try to keep reporting requirements as simple as possible.

2. Do not establish any service of this sort without ensuring the means for publicity. The 800 number did not get the use it should have because there was not funding provided for publicity.

3. The publicity for such a service MUST be firmly in place with a PAID staff person to ensure communication to the public about the availability of a toll-free number. This responsibility cannot be layered on top of a multiple stack of other responsibilities program directors currently manage.

4. Refer calls to literacy services in their own jurisdiction and assess the number of literacy agencies requiring or desiring services.

5. Get adequate budget and staff first.

OPERATORS INTERVIEW QUESTIONNAIRE AND RESPONSES

This questionnaire was administered face to face to operators involved in testing the literacy referral service. The purpose of the questionnaire was to gain some insite about the conditions that made the service successful, how the operators were affected by their involvement, and to get their recommendations and suggestions for other organizations wanting to replicate the service. Although their responses are not lengthy, I believe that some of them are very informative.

1. HOW DID YOU FEEL WHEN YOU HEARD THAT YOUR AGENCY HAD BEEN SELECTED TO PARTICIPATE IN TESTING THE REFERRAL SERVICE?

a. I didn't believe there was really a literacy problem, and that this type of service was needed. My views changed. It was worse than I imagined.

b. I thought it was a good program because I had heard about the one in Oakland.

c. My reaction was personal and I was glad, because I think it's needed. A member of my family has a reading problem, and he has now enrolled in the program. It was really the only help that was available and not frustrating . . . .

d. At first I thought it was going to be real complicated similar to the parental stress line. "I didn't anticipate it being as easy as it is. People are all pleasant and patient. I had some preconceived notion that people would not be able to tell what they wanted" but that has turned out not to be.

2. WHAT EXPERIENCE HAVE YOU HAD IN WORKING WITH ADULT NON READERS OR ADULTS READING AT A VERY LOW LEVEL?

a. In New York I did reading for the blind and had a childrens' reading group, but that was a different experience.

b. Only a personal experience with a family member, who is a high school graduate. I was surprised to find out that there was a reading problem. I thought every high school graduate could read.

c. I know a couple. How can people get out of school and not (know) how to read?

d. I had had no experience at all.

3. DID YOU HAVE ENOUGH INFORMAITON ABOUT THE PROGRAM TO ENABLE YOU TO FEEL COMFORTABLE ABOUT MAKING CLIENT REFERRALS?

a. Yes. It was a good idea to know what the program was about.

b. Yes it was a good idea.

c. OK

d. Yes, it was just enough. Not time consuming.

4. WHAT OTHER INFORMATION WOULD HAVE BEEN USEFUL?

a. Program information was well covered. Most people want to get involved but they don't want the answering service staff to provide (unnecessary) answers. Keeping knowledge of answering service staff to a minimun is a good idea.

b. Felt is was adequate.

c. I thought it was just right. I tend to get too involved because of my personal experience. Not knowing everything about the program prevents me from getting too involved.

d. I Don't think other information was needed.

5. DO YOU FEEL THAT TRAINING IS NECESSARY TO PREPARE THE OPERATORS TO HANDLE 800 REFERRALS FOR CLIENTS WHO USED THE SERVICE?

a. I felt the orientation was needed to make staff aware of the clients needs.

b. What we had was sufficient.

c. Yes and no. It does take a period of adjustment.

d. I did not think the movie was necessary, but the background information was helpful otherwise you have the wrong idea about people, who are not ELS.

6. HOW DID YOU FEEL ABOUT HAVING AN INTERVIEW SCRIPT? WAS IT HELPFUL? HOW?

a. OK. It was helpful - gives a base to work from - to know what the program needs.

b. The orientation was good and helpful because the more "they" (operators)know the better.

c. Not useful. Information about the program is more useful.

d. Not crazy about it. The information was very basic and the script was not needed.

7. THE REFERRAL GUIDE UNDERWENT SEVERAL CHANGES. DO YOU FEEL COMFORTABLE WITH THE GUIDE IN ITS' PRESENT FORM?

a. It's OK now.

b. Now OK.

c. Yes, OK.

d. OK. Alpha order is OK.

8. IN YOUR OPINION DOES IT TAKE A PERSON WITH SPECIAL QUALITIES TO PROVIDE THIS TYPE OF SERVICE?

a. Needs patience and understanding, and flexibility. Should be a way of finding out information for the client.

b. Be helpful and patient.

c. The person doesn" need special qualities. A person "needs patients, empathy. It's shocking when you find out people can't read.

d. Yes, empathy. Helps (operators) be responsive to the client and want to see that they get help.

9. IS IT IMPORTANT FOR THE OPERATORS TO KNOW WHEN THERE WILL BE A HEAVY MEDIA BLITZ?

a. Yes, in case extra operators are needed.

b. Yes!

c. Yes. Knowing that we will have to answer the phones more.

d. Yes.

10 DO YOU THINK IT IS IMPORTANT FOR THE SERVICE TO OPERATE 24 HOURS PER DAY 7 DAYS PER WEEK?

a. Yes, because its' more accessible and more private. Some people may want to call at odd hours because they might not want anyone to know that they can't read. When the service is always accessible it provides them more opportunity for confidentiality.

b. Yes, 7 days a week.

c. Yes, because people working may not be able to call during regular work hours, if they work funny shifts. People also need time to get up the courage after they hear/see the number - to think about it before they will call.

d. Yes, because accessibility needs to correlate with the media.

11. HOW HAD THIS PROGRAM AFFECTED YOU PERSONALLY?

a. Increased my awareness and sensitivity to the problem. I had no idea of the magnitude. I would like to volunteer to become a tutor.

b. It's a good thing. I know two people who can't read.

c. Although I was aware that many people have a reading problem I was not aware that it was such a common one. Its nice to know that there is a program. Even adult schools don't have programs because ABE doesn't work with this level, and most adults are uncomfortable in a reading class of high school students, so they have no place to go. Most people are willing to pay if offered.

d. I was made more aware of the problem. I feel good that I am making a contribution.

12. WERE THERE ANY PROBLEMS ASSOCIATED WITH MAKING REFERRALS?

a. None. Some people who called had the wrong number. You always get a few calls from people who are hangups, cranks, or call for something other than what the service offers.

b. No. People were very nice and very patient.

c. No. Most people were very nice. Biggest problem was straightening out the information, and finding out what worked best. Very few problems now that the information is debugged.

d. No. At first I thought the callers were going to be very difficult, similar to the clients on the Rape Crisis Line, but that turned out not to be so. Everyone is pleasant and very patient, and callers seem to know what they want.

13. WHAT WOULD YOU RECOMMEND FOR ANYONE SETTING UP THIS TYPE OF SERVICE?.

a. It's important to provide some orientation to develop an awareness of the problem. Operators need to be sensitized to the problem so that they are willing to find (provide) help (for the caller).

I believe that a smaller agency (answering service) is better because operators are more caring and sensitive. To big companies "time is MONEY" and they are less likely to take additional time if needed, to be responsive to a clients' needs.

b. Don't think you can set it up any better than it was.

c. You can't do it ahead of time, (unless it is a mock set up). Operators need to become a part of the operation early on, by finding out from them what works and what they are comfortable with.

d. No recommendations.

14. OTHER COMMENTS:

In my opinion the only way to improve it (the service) would be the time factor - extra staffing with a big surge of calls.

Margaret Robinson
Project Manager
(415) 273-3432

CALIFORNIA
LITERACY
CAMPAIGN

Start Date

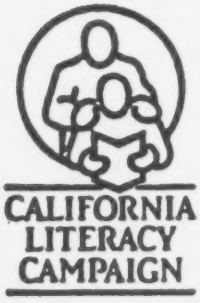
End Date

15-Second Spot Announcement

ANNOUNCER

Learning to read is like turning on a light in a dark room. If you are an adult and can speak English, you can learn to read FREE. Call now for a tutor in your own area. Call 800-262-2123. Help is just as near as your local library. That's 800-262-2123.

Margaret Robinson
Project Manager
(415) 273-3432



Start Date

End Date

20-Second Spot Announcement

ANNOUNCER

Are you 16 years or older and want to learn to read or read better? Are you tired of being in a large class with lots of people? You don't have to feel alone or ashamed. Many adults have trouble with reading. Your local library has FREE tutors. Call 800-262-2123. Remember, it's private and it's free. Call 800-262-2123.

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CALIFORNIA
LITERACY
CAMPAIGN

Start Date

End Date

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Out of work or want to change jobs, but don't have the reading and writing skills required? Want to read to your children or help them with their homework, but find you are unable to read their books? Well, help is available and it's FREE! Your local library is offering one-on-one tutoring to English-speaking adults in your own community. Call 800-262-2123. If you, or someone you care about, needs help, call NOW. 800-262-2123.